©iStockphoto.com/ Palto

Top Labs
VISION MONDAY 2010

Top Labs Hold Their Own

Independent ECPs outperform market, boosting wholesalers' 2010 sales

BY ANDREW KARP
GROUP EDITOR,
LENSES AND TECHNOLOGY

NEW YORK—Although the U.S. optical industry, like the rest of the nation's economy, remains in a slump, some bright spots are emerging. Specifically, modest gains by independent optical retailers in the first half of this year helped boost revenues for wholesale laboratories, including many of the the industry's largest labs, according to **VM**'s new Top Labs 2010 Report.

The report, which ranks the 30 labs by Rx sales (pairs of prescription lenses produced) and the number of Rx jobs produced per day, provides a fresh look at the Top 25 Independent U.S. Wholesale Labs and the Top 5 U.S. Supplier-Owned U.S. Wholesale Lab Networks. Published annually since 1991, the report also measures the percent of uncut Rx jobs produced by the Top Labs, the number of employees at each lab and other key performance criteria.

Rx Lens Sales Propel Growth

Despite a 3 percent decline in the total optical market during the 12-month period ending June, 2010, independent optical retailers generated $13.7 billion in sales, a 1.5 percent increase over the previous year, according to The Vision Council's VisionWatch survey. Notably, sales of prescription lenses among independent retailers totaled $4.9 billion at the retail level during this period, up by 2.5 percent from revenues from the prior 12-month period.

Correspondingly, the increase in Rx lens sales among independents is boosting sales and productivity among VM's Top Labs. Although some of the Top Labs saw decreases in their sales or in the number of Rx jobs per day they produce or else remained flat this year, new data from VM's 2010 Top Labs Report indicates most of the largest labs are growing.

Combined net sales for the Top Labs, including both the supplier-owned lab networks and the independent labs rose to $2,109.2 million, up 4.2 percent from 2009. Total Rx sales reached a record $1,771.3 million, a 3.8 percent increase over 2009. The Top Labs collectively produced a total of 124,945 Rx jobs per day, or approximately 31.9 million Rx jobs annually, a 2.0 percent increase over 2009.

Top 5 Supplier-Owned Networks

Growth among the Top 5 Supplier-Owned Lab Networks was both organic and the result of acqusitions (see story on page 27, "Top 5 Labs That Made News in 2010.") Collectively, the Top 5 will generate $1,524 million in total net sales, up 3.1 percent over 2009. 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, amounted to $1,347.2 million, a 4 percent increase over 2009. Rx lens sales comprised 91.7 percent of the total net sales for the 5 Top Labs, flat with 2009.

The number of Rx jobs per day for the Top 5 totalled 96,370, up 3.1 percent over 2009. The average proportion of uncut lens jobs among the Top 5 was 35.6 percent, down 1.7 percent from 2009.

The Top 5 currently operate a total of 193 individual lab locations, 18 more than in 2009. The Top 5 work force consists of 9,425 employees in 2010, up 2.7 percent over last year.

Individually, each of the Top 5 Supplier-Owned Wholesale Lab Networks grew in both estimated net sales and Rx sales in 2010. However, only Essilor, Carl Zeiss Vision Laboratories and Hoya

Continued on page 25

Vision Monday's TOP LABS – 2010

(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: Fred J. Balester, Dale Parmenteri, Patrick Balester, Susan Balester Dennis, James Balester, Valerie Balester, Dorothy Holdle, Jonathan Balester, Marc Balester, William Balester, Heather Balester, Fred P. Balester, Jacqueline Pekar
Trade Names: Balester Optical Co.
Key Markets: Eastern U.S.
2010 Est. Net Sales: $14 million
Rx Sales: $13.4 million
No. of Rx Jobs/Day: 875
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 lens brands: Varilux Physio Enhanced, Comfort Enhanced, Definity and Defnity Short, Essilor Ideal, 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, Coppertone, iRx, EOS, Sun Rx, Phoenix, Trilogy, Instashades, Life Rx, AO Compact Ultra, Pixel Optics. Frame Brands: Stetson, Sophia Loren, Randy Jackson, Via Spiga, Bulova, BUM, Just-Match-It, Bratz, Nickelodeon, Austin Reed, Manish Arora, Mayhem. Other products include Smart Mirror, Smart Look, Smart Centration, Y-Stick and VisiOffice. Services and programs include Value, Kid's & Drilled Rimless Packages, 2nd Pair Program, Eyenovate Polarized Clip System, Balester Direct Rx Program, Balester Back to School Program, ABO/NYSSO Certified Education. On-line ordering-VisionWeb, Eyefinity,E-Dr.com, Remote Tracing, 24 hour On-line order status. VSP, VBA, IDOC, Vision Source, 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
2010 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. Offers eductional seminars; on-site ARcoating.
www.brothersoptical.com

CSC LABORATORIES

Founded: 1967
HQ./Main Lab Location: Watsonville, Calif.
No. of Locations: 2
No. of Employees: 170

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: Dong Kook Kim; Mark C. Kim, Esq.; Robert C. Kim, Esq., Bu W. Kim
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
2010 Est. Net Sales: $28.5 million
Rx Sales: $29.1 million
No. of Rx Jobs/Day: 1,800
Percentage of Uncut Jobs: 30%
Comments: Exclusive U.S. manufacturer and distributor of Intellect free-form progressive lens design. Other free-form brands include Shamir Autograph, Physio 360 Enhanced and Definity. Authorized manufacturer of Crizal, Crizal Alizé and Avancé with Scotchgard, Magnum and Magnum Strada AR coatings. Teflon, PureCoat, Zeiss Carat Advantage. Operates largest AR coating facilities in Western U.S. Authorized manufacturer of Shamir Autograph, Varilux 360 and Definity. Offers complete range of stock lenses, including polycarbonate hard coated, AR coated, hard resin uncoated and hard coated, AR coated; high-index 1.67 and 1,74 hard coated, AR coated under trademarks Conti-Lite, Conti-Guard, Millenia AR; semi-finished progressive lenses under brand name TotalView. Frame product line consists of 250 styles under CSC's own trade names, plus a complete line of safety frames. High-fashion designer line distributed under Boutique Design subsidiary. Other lines include Martini Design, Gattinoni Collection and Garrison Perspectives Collection, Renato Balestra and West. Service programs include Rx Express Unlimited frame/lens program. Authorized VSP contract lab.
www.csclabs.com

CARL ZEISS VISION LABORATORIES

Founded: 2000
HQ./Main Lab Location: San Diego, Calif.
No. of Locations: 18
No. of Employees: 1,090

Key Executives: Joe Donahoe, Dave Delle Donne, David Jochims
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

Continued on page 22

Continued from page 20

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
2010 Est. Net Sales: $162 million
Rx Sales: $155.5 million
No. of Rx Jobs/Day: 10,870
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: 37

Key Executives: Adam Cherry, Lynn Cherry, Joe Cherry
Owners: Adam Cherry, Lynn Cherry, Joe Cherry
Trade Names: Safety Optix, Lenstock Direct
Key Markets: Upper Midwest
2010 Est. Net Sales: $7.2 million
Rx Sales: $7.1 million
No. of Rx Jobs/Day : 275
Percentage of Uncut Jobs: 20%
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: Monte Friedkin, president; Dawn Friedkin, GM; Bob Sherman, LDO, dir. of sales; Rodney Remsey, LDO, dir. of lab operations; Steve Mermer, director of information technology; Amy Needles, director HR/administration; Bob Elsas, director of marketing
Owner: Friedkin family
Trade Names: Classic Optical Lab
Key Markets: National
2010 Est. Net Sales: $14 million
Rx Sales: $13.9 million
No. of Rx Jobs/Day: 2,000
Percentage of Uncut Jobs: 1%
Comments: Independent lab producing more than 400,000 pairs of eyeglasses a year for more than 4,000 providers nationwide. State-of-the-art manufacturing facility offers complete in-house free-form digital surfacing, robotic lens edging (MEI) and precision drilled rimless capabilities. Authorized distributor of all major lens brands, featuring Shamir and Zeiss premium products. Offers full line of Essilor and Varilux products; many brands of AR. Offer numerous custom programs including Safety Rx, frame and lens packages, and customer incentives. Maintains staff of regional field consultants. Provides on-line ordering, rapid turnaround and competitive pricing.
www.classicoptical.com

DIVERSIFIED OPHTHALMICS LABORATORY GROUP

Founded: 1977
HQ./Main Lab Location: Cincinnati, Ohio
No. of Locations: 12
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.
2010 Est. Net sales: $28.2 million
Rx Sales: $12.9 million
No. of Rx Jobs/Day: 975
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. AR branded products includes PureSite Preference Plus. Specializes in premium 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. On-line and electronic ordering. Remote frame tracing. Member of the OLA and AR Council. 2006, 2007 and 2008 *LabTalk magazine* Top Ten Web Site of the Year. 2009 *LabTalk* Top Web Site.
www.divopt.com

ESSILOR

Founded: 1996
HQ./Main Lab Location: Dallas, Texas
No. of Locations: 140
No. of Employees: 6,450

Key Executives: Real Goulet-president, Mike Nathe-senior VP ELOA, Rick Long- senior VP Partner Labs, Brad Staley-VP Operations and Technologies, Keith Norris-VP ECP Sales, Greg DiPasquale – VP Strategic Accounts.
Owner: Essilor International
Trade Names: 21st Century Optical, Abba Contact Lens, AccuRX Inc., ACO, Advance Optical, Apex, Aspen Optical, Avisia, 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, Dependable Optics, Duffens Optical, Dunlaw Optical, East Coast Ophthalmic, Elite Optical, ELOA New Jersey, Empire Optical, Eyecare Express, Focus Optical, Future Optical FL, Future Optical TN, GK Optical, Gold Optical, Heard Optical, Hi-Tech, Homer Optical, Jorgenson Optical, Interstate Optical, Kosh Ophthalmic, Meridian Optical, McLeod Optical, MGM Optical, Midland Optical, Milroy, New City Optical, Next Generation, Omega Optical, Omni Optical Lab, Optical One, Inc, Optical Suppliers Inc., Optical Supply, Opti-Craft, Optimatrix, Optogenics of Syracuse, Orion, Ozarks Optical, Pech Optical, Perferx Optical, Peninsula Optical, Personal Eyes Optical, Precision Optical Company, Precision Optics, Premier Optics, S&G Optical,

Continued on page 24

VM's Top Labs Performance Analysis

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

	2010 ($millions)	2009 ($millions)	% change
Total Net Sales	$1,524.0	$1,477.0	+3.1
Total Rx Sales	$1,347.2	$1,293.9	+4.0
Avg. Rx Sales as Percentage of	91.7%*	91.5%*	+0.2
Total Rx Jobs Per Day	96,370	93,400	+3.1
Avg. Percent of Uncuts	35.6%	36.2%	-1.7
Total Number of Lab Locations	193	175	+9.3
Total Number of Employees	9,425	9,170	+2.7

VM's Top 25 Independent Wholesale Labs

	2010 ($millions)	2009 ($millions)	% change
Total Net Sales	$585.2	$544.4	+7.0
Total Rx Sales	$423.0	$408.8	+3.4
Avg. Rx Sales as Percentage of	92.2%**	94.5%**	-2.5
Total Rx Jobs Per Day	31,127	31,545	-1.3
Avg. Percent of Uncuts	33.6%	35.5%	-5.7
Total Number of Lab Locations	79	75	+5.1
Total Number of Employees	2,805	2,694	+4.0

*Does not include Nassau Vision Group Laboratories, which has Rx sales of 35 percent; remaining 65 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 45 percent and 46 percent respectively. Remaining percentage of Walman's and Diversified Total Net Sales are from various other products and services.
Source: Vision Monday

PERFORMANCE
in every *edger*

Our "Best-in-Class" Me, Lex and Le Lens Edger Series feature the highest technology, giving your practice ease-of-use and confidence to tackle any job proficiently. Edging high-base, super-hydrophobic and small "B" lenses is effortless. Even when advanced drilling, faceting, jewel insetting and polished safety beveling, our performance makes the most profitable jobs simple.

Santinelli INTERNATIONAL Perfecting the art inside the frame

santinelli.com 800.644.EDGE (3343)

Continued from page 22

Select 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, WOS Optical
Key Markets: Local and National
2010 Est. Net Sales: $990 million
Rx Sales: $910.8 million
No. of Rx Jobs/Day: 66,500
Percentage of Uncut Jobs: 41%
Comments: Nationwide network of full-service labs. Proprietary products include LiteStyle/Ultra LiteStyle Lenses, Crizal Avance with Scotchgard. Services and 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: 94

Key Executives: Don Ruden, CEO; Greg Ruden; president; Bob Pommier, director of lab operations; Mike Bradley, director of sales; Bob Hughbanks, director of education
Owner: The Ruden family
Trade names: Expert Best
Key Markets: Midwest
2010 Est. Net Sales: $20 million
Rx Sales: $18.2 million
No. of Rx Jobs/Day: 935
Percentage of Uncut Jobs: 20%
Comments: Manufactures free-form progressives including Shamir Autograph, AO Easy HD, Compact Ultra HD, SOLA HDV, SOLAOne HD, Zeiss Individual and other designs from leading lens companies. Distributes Kodak, Shamir, Varilux and Zeiss progressives. Signet Armorlite Partner lab, Carl Zeiss Vision Premier lab, Global Optics member. Produces Teflon Clear Coat and Kodak CleAR coatings in-house; also produces Zeiss Foundation XT, Carat and Carat Advantage lens treatments. Automated Speed Lab features a "No Touch" Rx processing line that provides a complete free-form Rx with premium AR with next-day service. Hosts annual Optical Preview Day. ABO-certified sales force offers in-office education seminars. Offers Jumpstart training program and Web-based lens inventory management system. Distributor sales department inventories over 50 frame lines with various frame and lens packages. Offers lens demonstrators and customizes lens displays through "Your Eyes" lifestyle dispensing program. Online ordering available through DVI, VisionWeb and Eyefinity. Authorized distributor of Carl Zeiss, Hoya, Shamir and Varilux lenses. VSP authorized. COLTS certified.
www.expertoptics.net

FEA INDUSTRIES

Founded: 1984
HQ./Main Lab Location: Morton, Pa.
No. of Locations: 1
No. of Employees: 56

Key Executives: William H. Heffner, III; Chrystal Colflesh, general manager; William H. Heffner, IV
Owner: Willliam H. Heffner, III
Trade Names: none
Key Markets: National
2010 Est. Net Sales: $12.7 million
Rx Sales: $11.8 million
No. of Rx Jobs/Day: 1,510
Percentage of Uncut Jobs : 84%
Comments: Full-service lab offering in-house AR and dip coating. Offers stock lenses, stock frames and safety frames. Web site includes ordering, tracking reports, invoices. Offers Kodak CleAR. Carries all major brands except Varilux. Participates in third-party programs; VBA only.
www.feaind.com

HARBOR OPTICAL

Founded: 1997
HQ./Main Lab Location: Traverse City, Mich.
No. of Locations: 1
No. of Employees: 42

Key Executives: Bob Westlake, director of operations; Mike Earl, director of sales and marketing
Owner: Geff Heidbrink
Trade Names: Exceed family of AR coatings, ILO digital lenses
Key Markets: Michigan
2010 Est. Net Sales: $7.1 million
Rx Sales: $6.5 million
No. of Rx Jobs/Day: 400
Percentage of Uncut Jobs: 12%
Comments: Special programs include Partner Perks, Profit Boost, Jumpstart Training, Individual Eyes. Global Optics member.
www.harboroptical.com

HIRSCH OPTICAL

Founded: 1978
HQ./Main Lab Location: Farmingdale, N.Y.
No. of Locations: 1
No. of Employees: 50

Key Executives: Harold Rothstein, president/CEO; Kenneth Mittel, senior VP; Michael Rothstein, VP; Richard Salberg, director of sales; Vicki Masliah, director of professional education
Owners: Hal Rothstein, Ken Mittel, Michael Rothstein
Trade Names: CHAD and Super CHAD
Key Markets: N.Y., N.J., Pa., Conn.
2010 Est. Net Sales: $13 million
Rx Sales: $12.1 million
No. of Rx Jobs/Day: 800
Percentage of Uncut Jobs: 35%
Comments: Extensive offerings of lens and frame package programs and year-long premium lens and AR coating promotions. Offers proprietary AR coatings applied in-house: CHAD (Clear, Hard, Anti-Reflective, Durable) and premium coating Super CHAD. Same-day turnaround on most orders. 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 Partner Lab, 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, Donald J. Trump,

Continued on page 26

Top Labs See Gains in 2010

Continued from page 19

Vision Care increased Rx production. The number of Rx jobs per day produced by VSP Labs declined 4.2 percent from last year. Nassau Vision Group Laboratories Rx production was flat compared with 2009.

Sales and productivity increases by the Top 5 Supplier-Owned labs are a direct result of the efforts by the lens manufacturers that own these labs—Essilor, Hoya Vision Care and Carl Zeiss Vision—to aggressively market their own brands of free-form and digitally designed lenses (VSP Labs produce and market free-form lenses designed by Essilor and Zeiss. Nassau Vision Group/Nova Optical Lab is owned by Essilor).

The Top 25 Independents

Among the Top 25 Independent Labs, growth was almost entirely organic. Only one of the Top 25, Precision Optical Group, made an acquisition in 2010, securing a minority interest in CRX Laboratories located in Greenville, S.C. and Athens, Tenn.

Fifteen of the Top 25 Independents increased their net sales in 2010 versus only 14 in 2009. Fourteen of the Top 25 increased their Rx sales versus this year versus only 12 last year, and 12 produced more Rx jobs per day this year versus 10 in 2009.

The total aggregate net sales for the Top 25 Independents was $585.2 million, a 7.0 percent increase over 2009. This represents a significant advance over 2009, when net sales for the Top 25 decreased 4.2 percent from the prior year. Similarly, total Rx sales for the Top 25 climbed to $423 million in 2010, a 3.4 percent increase over 2009. This represents a turnaround from 2009, when total Rx sales amounted to only $408.8 million, the lowest level since 2005.

Rx sales accounted for 92.2 percent of net sales for the Top 25, down 2.5 percent from 2009. Unit sales among the Top 25 fell slightly to 31,127 Rx jobs per day, down 1.3 percent from 2009. Uncut lenses, on average, accounted for 33.6 percent of Rx jobs produced by the Top 25, down 5.7 percent over 2009.

The total number of lab locations operated by the Top 25 increased from 75 in 2009 to 79 in 2010. Despite the widespread unemployment on a national level, the Top 25 increased the size of its work force 4.0 percent from 2009, to 2,805 workers.

The composition of the Top 25 remained almost identical to 2009, with only one change—Superior Optical Labs of Ocean Springs, Miss., entered the ranking for the first time. This contrasts with other recent years in which a number of Top 25 Independents were acquired by Top 5 Supplier-Owned Labs.

Economic pressures did not significantly impact capital expenditures among the Top Labs in 2010. Many of the labs invested in new technology, particularly digital surfacing and finishing equipment and the lab management systems that help run them.

Labs that have implemented this technology say there is often a short-term decrease in the lab's productivity as staff iron out the technical wrinkles involved in producing top quality free-form lenses. This observation is borne out by the slight decrease in the number of Rx jobs per day among the Top 25 Independents. However, the productivity decreases are offset by an increase in Rx sales, reflecting the higher prices free-form Rxs command.

Continued from page 24

Elizabeth Arden, Elizabeth Arden Petites, Elizabeth Arden Sunwear, Essence Eyewear, Hershey's Eyewear, Jill Stuart Eyewear, Levi's, Liberty Rec Specs, Marco Polarized Sunwear, Mount Eyewear (monel, stainless steel, titanium, polarized sport), New Balance, New Balance Kids, Perry Ellis, Stylewise and Scooby-Doo! Distributes Fantom custom clip-ons, Podreaders and Titmus safety frames. Web site features special retail customer referral program.

www.hirschoptical.com

HOYA VISION CARE

Founded: 2000
HQ./Main Lab Location: Lewisville, Texas
No. of Locations: 22
No. of Employees: 1,200

Key Executives: Barney Dougher, president; Yoshiyuki Ono, VP lens technology; Rich Montag, VP sales; Rick Tinson, VP of corporate governess; Kraig Black, VP information services; Jason White, senior executive controller; 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 Modesto, Hoya New Orleans, Hoya Portland, Hoya Salina, Hoya San Antonio, Hoya San Diego, Hoya Seattle, Hoya St. Louis.
Key Markets: National
2010 Est. Net Sales: $212 million
Rx Sales: $180 million
No. of Rx Jobs/Day: 11,200
Percentage of Uncut Jobs: 18%
Comments: Nationwide network of full-service labs. Proprietary lens designs: Hoyalux iD MyStyle, Hoyalux iD InStyle, Hoyalux iD LifeStyle, Hoyalux iQ Summit ecp, Hoyalux iQ Summit cd, Hoyalux Summit ecp, Hoyalux Summit cd, Hoyalux GP Wide, Hoyalux GP, Hoyalux TACT, Nulux ep. Proprietary lens materials: 1.70, Eyry, 1.67 Eynoa, 1.60 Eyas, 1.53 Phoenix,1.50 Hilux and Nulux. Proprietary lens coatings: Super HiVision AR EX3, Super HiVision AR, HiVision AR, ViewProtect top coating, Suntech photochromics and Clarity Shield 2 scratch coating. Special Services/Programs include HHP (Hoya Honors Program) and The Hoya Free-Form Company.

www.hoyavision.com

ICARE LABS

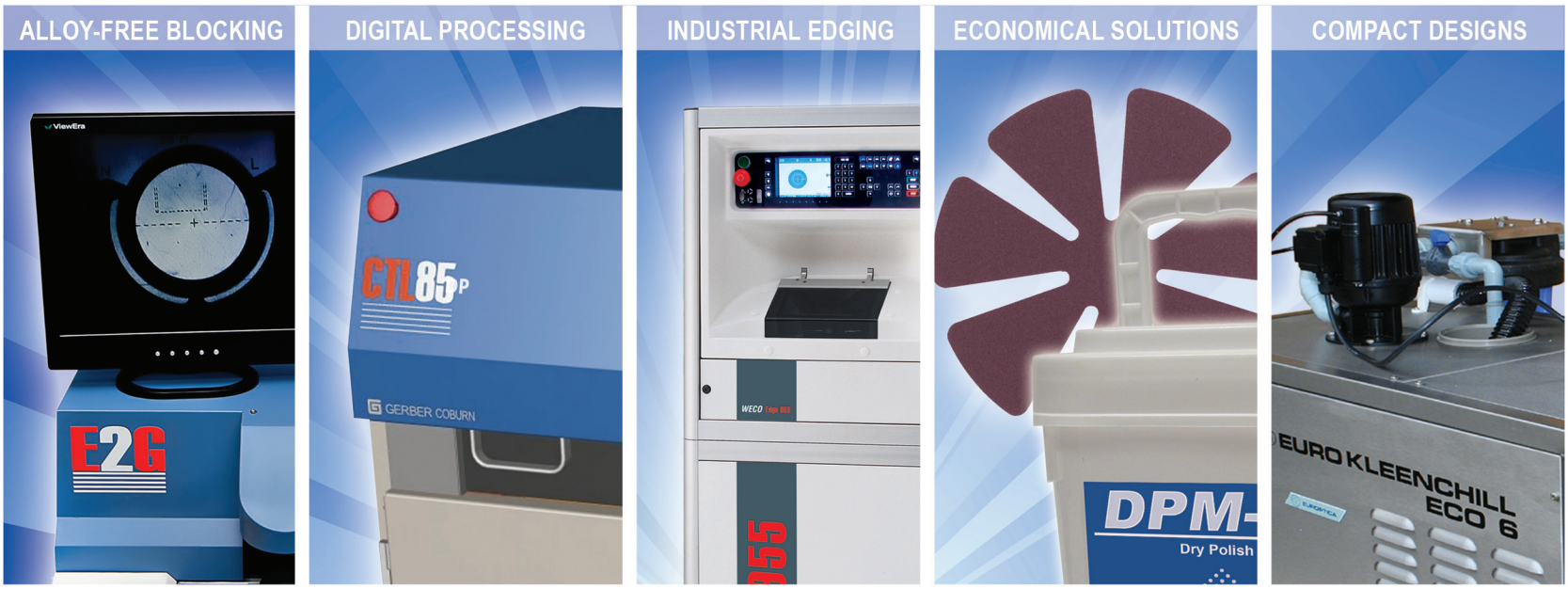
Founded: 1968
HQ./Main Lab Location: St. Petersburg, Fla.
No. of Locations: 1
No. of Employees: 95

Key Executives: Scott Payne, chairman; Skip Payne, president; James Payne, Danny Payne, Greg Gehrig
Owners: The Payne family
Trade Names: Icare Labs, ICL365, Sea Vision USA

Continued on page 28

BLOCKING GENERATING EDGING CONSUMABLES CHILLERS

All New Products, All New Possibilities...



INTRODUCTORY INCENTIVES ON SELECT PRODUCTS

800.262.8761 GERBER COBURN.com
A Gerber Scientific Company

Top 5 Labs That Made News in 2010

NEW YORK—In 2010, the Top 5 Supplier-Owned Lab Networks have continued to expand their market share through mergers and acquisitions as well as by upgrading existing labs with high performance lens coating capabilities, digital surfacing systems and proprietary products. However, the independent wholesale labs that were acquisition targets in 2010 are smaller those than in previous years.

Unlike large independents such as Pech Optical, which was acquired by Essilor in 2009 and had $37 million in annual revenue or Interstate Optical, acquired by Essilor in 2008, with $24.9 million annual revenue, the independents acquired this year all reported earnings of less than $7.0 million. This may be due to the weak economy or the fact that the number of large independent labs that are attractive acquisition targets is shrinking.

M&A activity kicked off in January, when Essilor announced that it bought a majority or total interest in three labs: Ultimate Optical in Florida, with $6.3 million in annual revenue, Optical Dimensions in Michigan, with $3.7 million in annual revenue, Truckee Meadows Optical in Nevada, with $3 million in annual revenue.

Also in January, Carl Zeiss Vision announced a joint venture with Marcella Optical that resulted in the Cedar Rapids, Iowa lab joining Zeiss' lab network.

In March, VSP Labs announced the launch of Unity Performance Coatings, an in-house line of anti-reflective coatings. The line, consisting of Unity, Unity Plus and Unity Elite, is available exclusively through VSP's wholly-owned laboratories.

The following month, Essilor acquired Hawkins Optical, a Topeka, Kansas-based prescription laboratory with $4.5 million in revenue. Hawkins Optical then relocated to

Continued on page 37

VM's Top 5 Supplier-Owned U.S. Lab Networks '10 Rx Sales
($ millions)

1	Essilor	$910.8
2	Hoya Vision Care Laboratories	180.0
3	Carl Zeiss Vision Laboratories	155.0
4	VSP Optical Laboratories*	72.4
5	Nassau Vision Group Laboratories	29.0

VM's Top 5 Supplier-Owned U.S. Lab Networks '10 Rx Jobs/Day

1	Essilor	66,500
2	Hoya Vision Care Laboratories	11,200
3	Carl Zeiss Vision Laboratories	10,870
4	VSP Optical Laboratories*	4,800
5	Nassau Vision Group Laboratories	3,000

*Does not include contract labs Source: Vision Monday

PASSION
in our *people*

For nearly 40 years, our family-owned and operated company is as passionate about In-Office Finishing and supporting our customers as ever! Whether you're new to finishing or a skilled pro, our experience and devotion will help set you apart. Maybe it's because we're not a subsidiary, a division or even a parent company. We're people – dedicated to our customers' success.

Santinelli INTERNATIONAL Perfecting the art inside the frame

santinelli.com 800.644.EDGE (3343)

Continued from page 26

Key Markets: East Coast, Southwest
2010 Est. Net Sales: $23.0 million
Rx Sales: $17.2 million
No. of Rx Jobs/Day: 1,700
Percentage of Uncut Jobs: 65%
Comments: Full-service, family owned and operated. Offers all major lens brands such as Varilux, Kodak, Zeiss and Hoya. Offers customized services and pricing on lenses and frames. Operates in-house Crizal AR coating center. Offers proprietary ICE AR brand. Manufactures specialized sport prescription lens products including SeaVision dive masks.
www.icare.com

KATZ & KLEIN

Founded: 1937
HQ./Main Lab Location: Sacramento, Calif.
No. of Locations: 1
No. of Employees: 36
Key Executives: Mike Francesconi, Corrine Hood
Owners: Mike Francesconi, Corrine Hood
Trade Names: Your Eyes, Supreme Partnership In Eyecare (SPIE), Katz Prudent Plan
Key Markets: Northern Calif., Nev.
2010 Est. Net Sales: $5.5 million
Rx Sales: $5.0 million
No. of Rx Jobs/Day: 350
Percentage of Uncut Jobs: 25%
Comments: Produces in-house AR, including Kodak CleAR and Crizal. Proprietary programs include Jumpstart, Lenstock, SPIE, Katz Lens Packages, Katz Frame Packages. Global Optics member.
www.katzandklein.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, Crizal Alizé, Crizal Alizé with Clear Guard, TD2, Teflon, Advantage, Carat and Foundation XT, Kodak CleAR
Key Markets: National
2010 Est. Net Sales: $31.9 million
Rx Sales: $30.9 million
No. of Rx Jobs/Day: 1,900
Percentage of Uncut Jobs: 51%
Comments: 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. Specializes in processing all major brands of Free Form Progressive lenses. Manufactures SightStar, Polar365, PhotoFashion, Varilux, Zeiss, Definity, Shamir, Kodak, Hoya, Polycore, Kaenon, Seiko, Vision-Ease, Marinelli, DriveWear premium lenses and difficult Rx's. Offers frames, sunglasses, safety eyewear, soft contacts,

low vision and pharmaceuticals. Operates in-house AR facilities producing EVC–enhanced visual clarity, Crizal, Alize, Avance with Scotchgard Protector, TD2, Teflon, Zeiss Super & Gold ET, Advantage, Carat, Foundation XT, Mirror coatings and KODAK CleAR. In-House Gas Perm contact lens facility produces custom DuraCurve aspheric GPs. Provides advanced remote ordering with RxWizard, Visionweb, Paradeyes and Eyefinity software via the Web. VSP and VBA approved lab.
www.luzerneoptical.com

MJ OPTICAL

Founded: 1988
HQ./Main Lab Location: Omaha, Neb.
No. of Locations: 1
No. of Employees: 82

Key Executives: Martin Hagge, Morrie Hagge, Matt Hagge, Michael Hagge
Owner: Mary Hagge
Trade Names: None
Key Markets : National
2010 Est. Net Sales: $14.4 million
Rx Sales: $10.1 million
No. of Rx Jobs/Day: 1,457
Percentage of Uncut Jobs: 55%
Comments: Distributes wide range of premium lens and frame brands. Offers free-form digital surfacing. Proprietary products include Nyteyez premium AR. Distributes Crizal and Zeiss AR. Offers MJFP frame package; TFP frame and lens package, safety programs. 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; Brian Ziegler, director of lab operations
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
2010 Est. Net Sales: $83 million
Rx Sales: $29 million
No. of Rx Jobs/Day: 3,000
Percentage of Uncut Jobs: 75%
Comments: Leading stock lens distributor, operates full-service labs. Offers surfacing, finishing, drill mounting, coatings and lens tinting. Varilux-authorized. Offers in-house Crizal coatings, including Crizal Avancé with Scotchgard Protector. 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

Continued on page 30

Ultimate Craftsmanship Has Arrived.

For the most sophisticated eyewear and maximum profitability, Santinelli International introduces the all-new, flagship Me 1200 Lens Edger.

The Me 1200 is truly in a class of its own, allowing you to edge all materials for every frame with solid confidence and ease. Only Santinelli International can assure you of the accuracy, quality and reliability you need with the Me 1200's "built-in craftsman" technology.

Let the Me 1200 do all the work effortlessly and see the difference in your lab, in your Rx finish work and in your bottom line.

Find us on Facebook

Edging equipment designed by NIDEK

Santinelli INTERNATIONAL Perfecting the art inside the frame
800.644.3343 • santinelli.com

Continued from page 29

OPTICAL PRESCRIPTION LAB

Founded: 1977
HQ./Main Lab Location: Pelham, Ala.
No. of Locations: 1
No. of Employees: 23

Key Executives: Danny Pugh, president; Sherry Pugh, vice president
Owners: Danny Pugh, Sherry Pugh
Trade Names: none
Key Markets: Ala., Tenn., Miss., Ga., Fla.
2010 Est. Net Sales: $5.4 million
Rx Sales: $5.1 million
No. of Rx Jobs/Day: 300
Percentage of Uncut Jobs: 28%
Comments: Operates in-house Crizal processing center. Distributes Varilux, Hoya, Shamir, Transitions and RF Endura EZ lenses. www.opticalprescriptionlab.com

PERFECT OPTICS

Founded: 2006
HQ./Main Lab Location: San Diego, Calif.
No. of Locations: 1
No. of Employees: 63

Key Executives: Matt Schmidt-Wetekam, CEO; Thomas Brophy, VP, Sabine Rentschar, VP technology; Adam Winkelman, VP sales and marketing
Owners: Warren Meyer, Matt Schmidt-Wetekam, Thomas Brophy, Sabine Rentschar, Adam Winkelman, director of sales and marketing; VSP, Carl Zeiss Vision
Trade Names: Perfection FF Lens, Perfect Ion AR Coating
Key Markets: National
2010 Est. Net Sales: $12 million
Rx Sales: $12 million
No. of Rx Jobs/Day: 520
Percentage of Uncut Jobs: 25%
Comments: Specializes in free-form, digital surfacing. Proprietary products include Perfection free-form lens, Perfection Blue AR coating. Offers sports Rx manufacturing for most major sun and sports frame brands. Offers Perfect Academy series of education. *www.perfectopticslab.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: P.O.G. Labs, JMR Wholesale, K-Optical, CRX Labs
Key Markets: National, Canada
2010 Est. Net Sales: $17.5 million
Rx Sales: $15.7 million

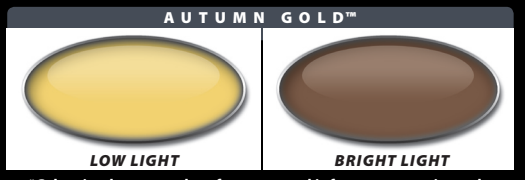
Continued on page 32

INTRODUCING THE ULTIMATE CONTRAST ENHANCING LENS

ARIS™ AUTUMN GOLD™ TRANSITIONS® SOLFX™

Exclusively from X-CEL, Aris Autumn Gold Transitions SOLFX sun lenses enhance clarity and contrast while automatically adjusting to whatever light conditions the day may bring.

A contrast-enhancing yellow lens with blue blocking properties, Autumn Gold changes to a rich brown lens in bright light, blocks 100% of harmful UV rays, and exceeds the FDA requirement for impact resistance.



*Color simulates actual performance and is for representation only.

Available in SFSV, 1 – 9 base

For more information, call Customer Service at (800) 747-9235

Transitions SOLFX™

©2010 X-Cel Optical Company, all rights reserved. Aris and Autumn Gold are trademarks of X-Cel Optical Company. Trivex is a registered trademark of PPG Industries. Transitions and the swirl are registered trademarks of Transitions Optical, Inc., SOLFX is a trademark of Transitions Optical, Inc.

X-CEL OPTICAL
THE ULTIMATE VISION.

Continued from page 30

No. of Rx Jobs/Day: 1,500
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 low cost name brand progressives and five in-house AR coatings including Clear AR, Crizal, Teflon and Courage Coating.
www.poglabs.com

RITE-STYLE OPTICAL

Founded: 1948
HQ./Main Lab Location: Omaha, Neb.
No. of Locations : 1
No. of Employees: 110

Key Executives: George Lee, CEO; Larry Lee, president
Owner: Lee family
Trade Names: RSO Advantage AR, Rite Protect
Key Markets: Midwest, Southeast, Texas
2010 Est. Net Sales: $22.5 million
Rx Sales: $21.4 million
No. of Rx Jobs/Day: 1,100
Percentage of Uncut Jobs: 30%
Comments: Leading producer of free-form lenses, featuring in-house production of Shamir Autograph II. Produces RSO Advantage AR, Zeiss and KodakCleAR coatings in-house. Other proprietary products include XZilon EZ Clean hydrophobic lens coating. Offers online ordering, lens tracing and job status tracking. Affiliations include Eyefinity/VSP, Vision Source, VisionWeb and Red Tray Optical. RSO Safety Rx Division covers corporate accounts nationally as well as safety programs for independent ECPs. RSO's Jumpstart training CDs offer ABO-certified modules for in-office education and training. Global Optics member.
www.ritestyle.com

ROBERTSON OPTICAL LABORATORIES

Founded: 1958
HQ./Main Lab Location: Loganville, Ga.
No. of Locations: 3
No. of Employees: 105

Continued on page 34

VM's Top 25 Independent Wholesale Labs by '10 Rx Sales

($ millions)

1	Walman Optical	98.0
2	Luzerne Optical	30.9
3	CSC Laboratories	29.1
4	Rite-Style Optical	21.4
5	Three Rivers Optical	18.4
6	Expert Optics	18.2
7	Icare Labs	17.2
8	Precision Optical Group	15.7
9	Robertson Optical	15.3
10	US Optical	14.4
11	Classic Optical Laboratories	13.9
12	Balester Optical	13.4
13	Diversified Ophthalmics	12.9
14	Hirsch Optical	12.1
15	Perfect Optics	12.0
16	FEA Industries	11.8
17	Brothers' Optical Laboratory	10.5
18	MJ Optical	10.1
19	Winchester Optical	9.4
20	Toledo Optical	8.7
21	Cherry Optical	7.1
22	Harbor Optical	6.5
23	Superior Optical Labs	5.9
24	Optical Prescription Lab	5.1
25	Katz & Klein	5.0

VM's Top 25 Independent Wholesale Labs by '10 Rx Jobs/Day

1	Walman Optical	6,700
2	Classic Optical Laboratories	2,000
3	Luzerne Optical	1,900
4	CSC Laboratories	1,800
5	Icare Industries	1,700
6	Three Rivers Optical	1,600
7	FEA Industries	1,510
8	Precision Optical Group	1,500
9	MJ Optical	1,457
10	Robertson Optical	1,400
11	Rite-Style Optical	1,100
12	Diversified Ophthalmics	975
13	US Optical	950
14	Expert Optical	935
15	Balester Optical	875
16	Hirsch Optical	800
17	Winchester Optical	700
18	Toledo Optical	530
19	Perfect Optics	520
20	Brothers' Optical Laboratory	500
21	Harbor Optical	400
22	Katz & Klein	350
23	Superior Optical Labs	350
24	Optical Prescription Lab	300
25	Cherry Optical	275

Rx sales estimates for calendar year 2010 are based on information from a number of sources, including 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

Continued from page 32

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.
2010 Est. Net Sales: $16.1 million
Rx Sales: $15.3 million
No. of Rx Jobs/Day: 1,400
Percentage of Uncut Jobs: 23%
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 free-form lenses and Coze free-form lenses. Approved VSP, VBA, VCP contract labs. Offers frame and lens packages, specializing in three-piece mounts and Chemistrie custom clips. Vera Bradley and Sydney Love frame distributors. Member Vision Council 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: 56

Key Executives: Hal Walker, Jon Jacobs
Owner: Hal Walker, Jon Jacobs
Trade Names: Exilar and Exilar Plus
Key Markets: N.Y., N.J., Conn.
2010 Est. Net Sales: $6 million
Rx Sales: $5.9 million
No. of Rx Jobs/Day: 350
Percentage of Uncut Jobs: 7%
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
2010 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.

Continued on page 36

Our Labs Rock.

The Transitions Heritage Lab Ambassador's Club is a proud sponsor of LABAPALOOZA at Vision Expo West.

Balester Optical Co.
Diversified Ophthalmics, Inc.
Soderberg Ophthalmic Services
Three Rivers Optical
Toledo Optical
Walman Optical
Winchester Optical

These labs share a common goal of strengthening the role of independent labs in the industry, a vital part in Transitions Optical's success. Want to be in the club? Ask your Transitions rep today. Rock on!

HERITAGE LAB AMBASSADORS CLUB

Transitions®

Transitions.com

Transitions and *the swirl* are registered trademarks of Transitions Optical, Inc.
©2010 Transitions Optical, Inc. Photochromic performance is influenced by temperature, UV exposure and lens material.

Continued from page 34

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. 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
2010 Est. Net Sales: $9.5 million
Rx Sales: $8.7 million
No. of Rx Jobs/Day: 530
Percentage of Uncut Jobs: 8%
Comments: Proprietary products include Acclaro Elite and Acclaro Anti Reflective Lens Processes, Armor XT Premium Scratch Coating, STRATA Multi-Media Training Series, and Jumpstart Education. Services and programs offered include dedicated sales force, extensive training and education programs, exclusive practice building initiatives such as Strata, exclusive in-house Acclaro AR lens process, One Step Rx, individualized customer performance reports. Distributes Varilux, Shamir and Zeiss lenses. Williams Group Certified Sales Consultants, Transitions Lab of the Year 2003 and 2006, 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, and Global Optics Member.

www.toledooptical.com

US OPTICAL

Founded: 2008
HQ./Main Lab Location: East Syracuse, N.Y.
No. of Locations: 1
No. of Employees: 52
Key Executives: Robert Cotran, president; Ronald Cotran, VP; Ralph Cotran, VP
Owners: Robert Cotran, Ronald Cotran, Ralph Cotran
Trade Names: none
Key Markets: National
2010 Est. Net Sales: $14.4 million
Rx Sales: $14.4 million
No. of Rx Jobs/Day: 950
Percentage of Uncut Jobs: 60%
Comments: 100 percent digital surfacing with three robotic digital free-form machines, six free-form polishers and three Zeiss AR coaters (also traditional production lines). Free-form products include Seiko, Shamir, Zeiss, Hoya (coming soon). Zeiss in-house ARs include Set/Get, Carat, Advantage, Allure and Pure Coat. 24-hour uncut business model on free-form uncuts with AR and Zeiss flash mirrors. MEI edger coming soon.

www.usoptical.com

VSP OPTICAL LABORATORIES

Founded: 1972
HQ./Main Lab Location: Sacramento, Calif.
No. of Locations: 5
No. of Employees: 475

Key Executives: Don Oakley, president; Warren Meyer, VP; Joe Maris, director, Sacramento; Dennis Benedict, director, Legends 4.0; Swen Carlson, director, Columbus; Edward Morris, director, national sales and marketing; Steve Mullen, director, Capitol Optical; Danny Singer, director, Ultra Optics
Owner: Vision Service Plan
Trade Names: VSP Lab Sacramento, VSP Lab Columbus, Legends 4.0, Ultra Lens, Capitol Optical, Reveal and Espira progressive lenses, Unity Performance Coatings, Ethos AR Coating.
Key Markets: National
2010 Est. Net Sales: $77 million
Rx Sales: $72.4 million
No. of Rx Jobs/Day: 4,800
Percentage of Uncut Jobs: 15%
Comments: VSP Lab Rewards Program, Second Pair Program, VSP Global Loyalty Program, On-site AR including Crizal, Teflon, Zeiss, Ethos AR Coating and Unity Performance Coatings. In-network digital (customized/freeform) surfacing capabilities producing Espira, Reveal, Shamir, Sola, Varilux and Zeiss customized 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: 34
No. of Employees: 868

Key Executives: Marty Bassett president/CEO; Charles Pillsbury, executive VP; Doug Schlauderaff, executive VP; Craig Giles executive VP; Bryan Schueler VP.
Owner: Employee-owned
Trade Names: Walman Optical, Soderberg Optical, SEOCO Optical, Walman Soderberg Instruments, X-Cel Contacts, ImageWear, Ultra Optics, ADO Buying Group, Preferred Select Buying Group
Key Markets: National
2010 Est. Net Sales: $220 million
Rx Sales: $98 million
No. of Rx Jobs/Day: 6,700
Percentage of Uncut Jobs: 20%
Comments: Complete digital surfacing capabilities supported by on-site A-R coating facilities providing Essilor Crizal, Teflon, Zeiss Carat and Ultra AR; offers Remo, Eyefinity and VisionWeb on-line ordering; Walman University educational seminars; industry's largest independent sales force. Proprietary products include Stepper Eyewear, Sundance, Wiggles and Wildflower frames, Trusted Partners, ProLens premium lens packaging, Way Cool Frame Cool, Valuline, MyTee-Lite lenses, Soderberg MaximEyes, Passport to Earnings, Ultimate Rewards, Partners for Growth Seminars and Be Young Be U programs. 2007 and 2008 Transitions Lab of the Year.

www.walman.com, www.soseyes.com

WINCHESTER OPTICAL

Founded: 1902
HQ./Main Lab Location: Elmira, N.Y.
No. of Locations: 2
No. of Employees: 80

Key Executives: Brian Lynch, president; Ben Lynch, VP; Mike Lynch, chairman of the board
Owner: Lynch family
Trade Names: LUXAR
Key Markets: N.Y., Pa., N.J.
2010 Est. Net Sales: $10.5 million
Rx Sales: $9.4 million
No. of Rx Jobs/Day: 700
Percentage of Uncut Jobs: 26%
Comments: Diversified lab with field sales-force; in-house Crizal processing facility; manufactures RGP contact lenses, distributes soft contact lenses and frames. Proprietary products include GlareControl and GlareCutter lenses. Offers practice management and office design consultation; sponsors biannual educational seminar for customers.
www.winoptical.com

Top 5 Labs That Made News in 2010

Continued from page 27

Duffens Optical, a Topeka laboratory that is part of the Essilor Laboratories of America network.

This summer, Essilor announced that it had acquired a stake in Epic Labs in Minnesota ($3 million in revenue) and also acquired the assets of Custom Optical in Georgia ($2.5 million in revenue). Additionally, Nikon Optical U.S., a Nikon-Essilor subsidiary, acquired a majority interest in Colorado-based Pasch Optical Laboratory, which generates $3.9 million in revenue. Essilor also acquired a majority stake in Louisiana-based Gulf States Optical, which generates $3 million in revenue.

In August, Hoya Vision Care, North America expanded its lab network with opening of a new facility in Salina, Kansas. In September, VSP Optics Group, as part of VSP Global, acquired Capitol Optical, a full-service optical laboratory located in Olympia, Wash. The purchase price was not disclosed. Capitol Optical processes an average of 300 prescriptions daily, and has 24 employees, according to a VSP spokesperson, who noted that VSP expects to increase the size of the lab's work force in the near future.

READ MORE ONLINE:
To download a download a PDF of VM's 2010 Labs Report, including a special "at a glance" reference chart showing the key performance data for the Top 25 Independent Labs, visit VisionMonday.com.

Protect your investment and safeguard your lenses with Eurolens® Superior Lens Saver Tape.

Expertly manufactured in Belgium, Eurolens® signature Lens Saver Tape provides superior, even adhesion and maximum scratch protection during surfacing on both plastic and mineral lenses.

Available in standard 108' (33 meters) rolls, Eurolens® tape can be used with a wide range of alloy temperatures. For more than 20 years, Eurolens® has provided exceptional, personal customer service and high standards of quality control.

Select Eurolens® for high quality -- without a high price.

EUROLENS®

Please call or email
888.229.2345
Charlie@eurolensaver.com

www.eurolensaver.com • Toll Free 888.229.2345 • P. O. Box 1618 La Jolla, CA 92038

The Top 25 Independent Labs in 2010 At a Glance

	LAB	Net Sales ($ millions)	Rx Sales (% of Net)	Rx Sales ($ millions)	Rxs Per Day	% of Uncuts	# of Employees	Years in Business
1	Walman Optical	220.0	45	98.0	6,700	20	868	96
2	Luzerne Optical	31.9	97	30.9	1,900	51	200	37
3	CSC Laboratories	31.0	94	29.1	1,800	30	170	42
4	Rite-Style Optical	22.5	95	21.4	1,100	30	110	62
5	Three Rivers Optical	19.2	96	18.4	1,600	55	80	41
6	Expert Optical	20.0	91	18.2	935	20	94	31
7	Icare Labs	23.0	90	17.2	1,700	65	95	42
8	Precision Optical Group	17.5	90	15.7	1,500	55	115	18
9	Robertson Optical	16.1	95	15.3	1,400	26	102	52
10	US Optical	14.0	100	14.4	950	60	52	2
11	Classic Optical	14.0	99	13.9	2,000	1	100	40
12	Balester Optical	14.0	96	13.4	875	54	89	76
13	Diversified Ophthalmics Laboratory Group	28.2	46	12.9	975	22	95	33
14	Hirsch Optical	13.0	93	12.1	800	35	50	32
15	Perfect Optics	12.0	100	12.0	520	25	63	4
16	FEA Industries	12.7	93	11.8	1,510	84	56	26
17	Brothers' Optical Laboratory	10.5	100	10.5	500	25	60	37
18	MJ Optical	14.4	70	10.1	1,457	55	76	22
19	Winchester Optical	10.5	90	9.4	700	26	80	108
20	Toledo Optical	9.5	92	8.7	530	8	55	63
21	Cherry Optical	7.2	98	7.1	275	20	37	11
22	Harbor Optical	7.1	92	6.5	400	12	42	13
23	Superior Optical Labs	6.0	99	5.9	350	7	56	19
24	Optical Prescription Lab	5.4	95	5.1	300	28	23	33
25	Katz & Klein	5.5	91	5.0	350	25	37	73

Rankings are based on Rx sales. Sales estimates reflect combined sources of business for calendar year 2010 and are calculated based on information from a number of sources, including 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