NEW YORK—In today’s challenging economic climate, flat is the new up, according to conventional wisdom. By that measure, even the modest gains made this year by the largest U.S. wholesale optical laboratories and reported in Vision Monday’s newly released 2009 Top Labs Report, are noteworthy.

The new data in the report provides a statistical snapshot of 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 Top Labs Report ranks the 30 labs by Rx sales (pairs of prescription lenses produced) and the number of Rx jobs produced per day. 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.

Although some of the 30 labs surveyed prospered while others struggled, overall the wholesalers again proved their resilience and stability, continuing to serve as a vital resource for eyecare professionals seeking new lens technology. Combined net sales for the Top Labs, including both the supplier-owned lab networks and the independent labs rose to $2,021.4 million, up 2.2 percent from 2008. Total Rx sales reached a record $1,702.3 million, a 3.3 percent increase over 2008. The Top Labs collectively produced a total of 124,945 Rx jobs per day, or approximately 31.3 million Rx jobs annually, representing a 1 percent increase over 2008.

Top 5 Supplier-Owned Networks

The Top 5 Supplier-Owned Wholesale Lab Networks turned in another solid performance in 2009. Collectively, the Top 5 will generate $1,477 million in total net sales, up 4.6 percent over 2008.

Continued on page 45
The WECO EDGE 950 exhibits an equal balance of power and control — suitable for cutting all lens materials. It possesses the muscle and through-put to handle your production needs, yet maintains the finesse to handle hydrophobic coated lenses easily and economically. Users refer to it as the workhorse they wouldn’t do without.

The WECO EDGE 950 exhibits an equal balance of power and control — suitable for cutting all lens materials. It possesses the muscle and through-put to handle your production needs, yet maintains the finesse to handle hydrophobic coated lenses easily and economically. Users refer to it as the workhorse they wouldn’t do without.

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<table>
<thead>
<tr>
<th>Company</th>
<th>Founded</th>
<th>HQ./Main Lab Location</th>
<th>No. of Locations</th>
<th>No. of Employees</th>
<th>Key Executives</th>
<th>Owners</th>
<th>Trade Names</th>
<th>Key Markets</th>
<th>2009 Est. Net Sales</th>
<th>Rx Sales</th>
<th>No. of Rx Jobs/Day</th>
<th>Percentage of Uncut Jobs</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brothers’ Optical Lab</td>
<td>1973</td>
<td>Orange, Calif.</td>
<td>1</td>
<td>59</td>
<td>Carlo Ragazzo, Tony Esposito</td>
<td>Joseph M. Ragazzo, John Ragazzo</td>
<td>none</td>
<td>California, Arizona, Las Vegas, Oregon, Hawaii</td>
<td>$11.5 million</td>
<td>$11.5 million</td>
<td>550</td>
<td>23%</td>
<td>Well-established, full-service lab</td>
</tr>
<tr>
<td>CSC Laboratories</td>
<td>1967</td>
<td>Watsonville, Calif.</td>
<td>2</td>
<td>165</td>
<td>Dong K. Kim, group president/CEO; Bu Kim, senior VP, manufacturing; Paul Yoon, VP, operations; Butch Fralix, VP, business development; Greg Kohmescher, CFO; Robert C. Kim, legal counsel; Mike Kim, GM, Microcoating Laboratory; Jim Serruys, GM, Ocular Laboratories</td>
<td>Dong Kook Kim</td>
<td>CSC Laboratories, (Watsonville, Calif.); Microcoating Laboratory (Watsonville, Calif.); Ocular Laboratories (San Jose, Calif.); Boutique Design, Inc.</td>
<td>U.S., Central and South America, Caribbean, South Pacific, South Pacific</td>
<td>$28.5 million</td>
<td>$25.6 million</td>
<td>1,650</td>
<td>30%</td>
<td>Authorized manufacturer of Crizal/ Crizal Alize AR coating, Teflon, PureCoat, Zeiss Carat, Authorized manufacturer of Shamir Autograph, Varilux 360 and Definity. Offers complete range of stock lenses, including polycarbonate hard coated, AR coated, hard resin uncoated, hard coated, AR coated; high-index 1.60 and 1.67 hard coated, AR coated under trademarks Conti-Lite, Conti-Guard, Milenia AR; semi-finished progressive lenses under brand name TotalView. Frame product line consists of 250 upper-middle and high-fashion styles under CSC’s own trade names, plus a complete line of safety frames that meet ANSI 287-1 standards. 40% of frame line manufactured in Europe under special arrangement; 60% manufactured in Asia. New designer frame lines for 2009 under Boutique Design, Inc., a solely owned subsidiary of Optics East, Inc.: 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.</td>
</tr>
<tr>
<td>Carl Zeiss Vision</td>
<td>2000</td>
<td>San Diego, Calif.</td>
<td>18</td>
<td>1,090</td>
<td>Fred Howard, Dave Delle Donne, David Jochims</td>
<td>Carl Zeiss Vision</td>
<td>Carl Zeiss Vision—B&amp;W,</td>
<td>U.S., Central and South America, Caribbean, South Pacific</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Key Executives: Fred Howard, Dave Delle Donne, David Jochims

Owner: Carl Zeiss Vision


Key Markets: Nationwide

2009 Est. Net Sales: $150 million

Rx Sales: $142.5 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: 28

Key Executives: Adam Cherry, Lynn Cherry, Joe Cherry

Owners: Adam Cherry, Lynn Cherry, Joe Cherry

Trade Names: Safety Optix

Key Markets: Upper Midwest

2009 Est. Net Sales: $6.0 million

Rx Sales: $5.9 million

No. of Rx Jobs/Day: 325

Percentage of Uncut Jobs: 20%


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and other educational programs; safety Rx programs.

CLASSIC OPTICAL
Founded: 1970
HQ./Main Lab Location: Youngstown, Ohio
No. of Locations: 1
No. of Employees: 70

Key Executives: Monte Friedkin, president; Dawn Friedkin, GM; Bob Sherman, dir. of sales; Rodney Remsey, dir. of lab operations
Owner: Friedkin family
Trade Names: None
Key Markets: National
2009 Est. Net Sales: $12.5 million
Rx Sales: $12.4 million
No. of Rx Jobs/Day: 1,900
Percentage of Uncut Jobs: 10%
Comments: Family-owned and operated state-of-the-art facility with digital/free-form surfacing equipment and two robotic precision lens edging lines (MEI); Authorized distributor of all major lens brands, featuring Shamir and Zeiss Premium Products; Full line of Essilor and Varilux products; Many brands of AR. Large frame inventory for custom programs (name brands include Essence, Dockers, Hilary Duff and Shrek); offers frame and lens packages (Affordable Vision, Value Vision, Premium Value); Online orders accepted via proprietary online ordering system, VisionWeb and Eyefinity; contract lab for VSP (Lab #126), VBA (Lab #267) and a number of other regional and national managed care programs.
www.classicoptical.com

Key Executives: Ronald Cooke, president/CEO; Ronald Cooke, Jr., COO
Owner: Closely held corporation
Trade names: DLAB, DO Kentuckiana, DO Southeast, DO Washington, OptiSource, PureSite, Salt Lake Optical, Summit Optical, TriOptics
2009 Est. Net sales: $30.6 million
Rx Sales: $13.2 million
No. of Rx Jobs/Day: 1,005
Percentage of Uncut Jobs: 20%
2006, 2007 and 2008 OLA Top Ten Web Site of the Year.
www.divopt.com

ESSILOR
Founded: 1996
HQ./Main Lab Location: Dallas, Texas
No. of Locations: 122
No. of Employees: 6,050

Key Executives: Real Goulet-president; Mike Nathe-senior VP ELOA; Rick Long-senior VP Partner Labs; Jim Carne senior VP West division; Brad Staley-VP operations and technologies; Keith Norris-VP sales and strategic accounts
Owner: Essilor International
Key Markets: Local and National
2009 Est. Net Sales: $968 million
Rx Sales: $880.1 million
No. of Rx Jobs/Day: 64,500
Percentage of Uncut Jobs: 40%
Comments: Nationwide network of full-service labs. Proprietary products include TD2, LiteStyle/ Ultra LiteStyle Lenses, Crizal Avance with Scotchgard. Services and programs include Education Series and Need Based Solutions.
www.ealoa.com

DIVERSIFIED OPHTHALMICS LABORATORY GROUP
Founded: 1977
HQ./Main Lab Location: Cincinnati, Ohio
No. of Locations: 13
No. of Employees: 115

Key Executives: Real Goulet-president; Mike Nathe-senior VP ELOA; Rick Long-senior VP Partner Labs; Jim Carne senior VP West division; Brad Staley-VP operations and technologies; Keith Norris-VP sales and strategic accounts
Owner: Essilor International
Key Markets: Local and National
2009 Est. Net Sales: $968 million
Rx Sales: $880.1 million
No. of Rx Jobs/Day: 64,500
Percentage of Uncut Jobs: 40%
Comments: Nationwide network of full-service labs. Proprietary products include TD2, LiteStyle/ Ultra LiteStyle Lenses, Crizal Avance with Scotchgard. Services and programs include Education Series and Need Based Solutions.
www.ealoa.com

EXPERT OPTICS
Founded: 1979
HQ./Main Lab Location: Shorewood, Ill.
No. of Locations: 2
No. of Employees: 92

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**Key Executives:** Greg Ruden; president; Don Ruden, CEO; Bob Pommier, director of lab operations; Sid Moore, director of sales; Bob Hughbanks, director of education.

**Owner:** Don Ruden, Greg Ruden

**Trade names:** none

**Key Markets:** Ill., Ind., Mich., Wis., Mo., Minn.

**2009 Est. Net sales:** $19 million

**Rx Sales:** $17.1 million

**No. of Rx Jobs/Day:** 930

**Percentage of Uncut Jobs:** 20%

**Comments:** Additional production facility to manufacture 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. Distributor of 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. Hosts annual Optical Preview Day. Experienced 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 a multitude of frame and lens package programs.

[www.expertoptics.net](http://www.expertoptics.net)

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**HARBOR OPTICAL**

**Founded:** 1997

**HQ./Main Lab Location:** Traverse City, Mich.

**No. of Locations:** 1

**No. of Employees:** 43

**Key Executives:** Bob Westlake, Mike Earl

**Owner:** Geff Heidbrink

**Trade Names:** Armorcoat, Exceed, Exceed XT

**Key Markets:** Michigan

**2009 Est. Net Sales:** $6.7 million

**Rx Sales:** $6.3 million

**No. of Rx Jobs/Day:** 390

**Percentage of Uncut Jobs:** 12%

**Comments:** Special programs include Partner Perks, Jumpstart Training, Individual Eyes. Global Optics member.

[www.harboroptical.com](http://www.harboroptical.com)

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**HIRSCH OPTICAL**

**Founded:** 1978

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

**No. of Locations:** 1

**No. of Employees:** 54

**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.

**2009 Est. Net Sales:** $13 million

**Rx Sales:** $12.1 million

**No. of Rx Jobs/Day:** 800

**Percentage of Uncut Jobs:** 35%


[www.hirschoptical.com](http://www.hirschoptical.com)

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**HOYA VISION CARE**

**Founded:** 2000

**HQ./Main Lab Location:** Lewisville, Texas

**Locations:** 19

**Employees:** 1,200

**Key Executives:** Barney Dougher, president/CEO; Yoshiyuki Ono, VP lens technology; Rich Montag, VP sales; Rick Tinson, VP corporate governance; Kraig Black, VP information services; Jason White, senior executive controller: Ray Knoll, Northwest regional VP; Mike Dougher, Midwest and Northeast

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**FEA INDUSTRIES**

**Founded:** 1984

**HQ./Main Lab Location:** Morton, Pa.

**No. of Locations:** 1

**No. of Employees:** 51

**Key Executives:** William H. Heffner, Ill; Chrystal Colflesh, general manager; William H. Heffner, IV

**Owner:** William H. Heffner, Ill

**Trade Names:** none

**Key Markets:** national

**2009 Est. Net Sales:** $10.9 million

**Rx Sales:** $10.9 million
Top Labs Show Resilience Despite Tough Market

Continued from page 37

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 $1,293.9 million, or 91.5 percent of total net sales on average. Although Rx sales for the Top 5 grew 5 percent from 2008, it amounts to a smaller proportion of the Top 5’s total net sales than in 2008. Conversely, the proportion of sales of non-Rx products such as stock lenses, frames and contact lenses, increased among the Top 5 this year.

The number of Rx jobs per day for the Top 5 totaled 93,400, up 1.7 percent over 2008. On an annualized basis, this amounts to a total of about 23.3 million Rx jobs, up from 22.9 million last year. The average proportion of uncut lens jobs among the Top 5 was 36.2 percent, the same as ’08.

The Top 5 added three individual lab locations in the past 12 months, bringing the total number to 175. The Top 5 work force consists of 9,170 employees in 2009, up 2.8 percent over 2008.

A significant portion of the Top 5’s growth resulted from acquisitions. Notably, Essilor acquired 12 independent labs in 2009, including two that ranked among VM’s Top 25 Independent Wholesale Labs in 2008—Pech Optical, based in Sioux City, Iowa (Number 2) and Southwest Lens, based in Dallas, Texas (Number 24).

The Top 25 Independents

Individually, many of the Top 25 Independent Labs experienced gains in 2009. Twelve of the Top 25 increased their Rx sales; 10 produced more Rx jobs per day in 2009 than in 2008.

However, in 2009, as in the previous year, the Top 25 experienced a collective downturn in sales and productivity. The decline is partly due to continuing industry consolidation, which has resulted in several large independent wholesalers such as Pech Optical joining a Supplier-Owned Lab Network.

The total aggregate net sales for the Top 25 Independents was $544.4 million, a 4.2 percent decrease from 2008. Total Rx sales for the Top 25 amounted to $408.8 million, down 2.1 percent from 2008 and the lowest level since 2005. Rx sales accounted for 94.5 percent of net sales for the Top 25, up from 92.6 percent in 2008. This increase, and the corresponding decline in non-Rx sales, is in contrast to the decreasing percentage of Rx sales among the Top 5 Supplier-Owned Labs.

Unit sales among the Top 25 fell slightly to 31,545 Rx jobs per day, down 1.2 percent from 2008. This amounts to approximately 7.9 million Rx jobs per year, flat with year ago levels. Uncut lenses, on average, accounted for 35.5 percent of Rx jobs produced by the Top 25, up 9.9 percent over 2008.
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**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.

**2009 Est. Net Sales:** $6.0 million

**Rx Sales:** $5.7 million

**No. of Rx Jobs/Day:** 401

**Percentage of Uncut Jobs:** 18%

**Comments:** Produces in-house AR, including Kodak CleAR and Crizal. Proprietary programs include Jumpstart, Lensstock, SPIE, Katz Lens Packages, Katz Frame Packages. Global Optics member.

www.katzandklein.com

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**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, Avance with Scotchgard Protector, Teflon, Zeiss Super and Gold ET, Advantage, Carat and Foundation XT, Kodak CleAR

**Key Markets:** National

**2009 Est. Net Sales:** $31.7 million

**Rx Sales:** $30.7 million

**No. of Rx Jobs/Day:** 1,900

**Percentage of Uncut Jobs:** 56%


www.luzerneoptical.com

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**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

**2009 Est. Net Sales:** $15.8 million

**Rx Sales:** $14.2 million

**No. of Rx Jobs/Day:** 1,590

**Percentage of Uncut Jobs:** 43%

**Comments:** Distributes wide range of premium lens and frame brands. Added free-form digital surfacing in September 2009. Proprietary products include Nyteyze premium AR and Miraje AR, both produced in-house. Offers MJFP frame package; TFP titanium frame and lens package, industrial safety programs. Distributes contact lenses. Offers on-line ordering and job tracking.

www.mjoptical.com

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**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:** François Bès de Berc; president, Irwin Kaufman, VP – CFO; Brian Ziegler, director of lab operations; David George, director of sales

**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

**2009 Est. Net Sales:** $82 million

**Rx Sales:** $28.7 million

**No. of Rx Jobs/Day:** 3,000

**Percentage of Uncut Jobs:** 81%

**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 in-house, value tested Synergy and Triumph AR Coatings. Can get virtually any product or equivalent on the market. Offers wide variety of lens brands, including Shore, Essilor, Varilux, Carl Zeiss Vision (Zeiss, AO, Sola), Seiko, KBco, Signet Armorlite, Optima, Vision-Ease, Shamir and Specialty Lens.

www.nassau247.com

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**OPTICAL PRESCRIPTION LAB**

**Founded:** 1977

**HQ./Main Lab Location:** Pelham, Ala.

**No. of Locations:** 1

**No. of Employees:** 25

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

**Owners:** Danny Pugh, Sherry Pugh

**Trade Names:** none

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

**2009 Est. Net Sales:** $5.3 million

**Rx Sales:** $4.9 million

**No. of Rx Jobs/Day:** 315
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Founded</th>
<th>HQ./Main Lab Location</th>
<th>No. of Locations</th>
<th>No. of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERFECT OPTICS</td>
<td>2006</td>
<td>San Diego, Calif.</td>
<td>1</td>
<td>58</td>
</tr>
<tr>
<td>Key Executives</td>
<td>Matt Schmidt-Wetekam, Thomas Brophy, Sabine Rentschar, Adam Winkelman, director of sales and marketing; Tom Brophy, director of operations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owners</td>
<td>Warren Meyer, Matt Schmidt-Wetekam, Thomas Brophy, Sabine Rentschar, Adam Winkelman, director of sales and marketing; Tom Brophy, director of operations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trade Names</td>
<td>Perfection FF Lens, Perfect Ion AR Coating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Markets</td>
<td>Calif., free-form nationwide</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2009 Est. Net Sales</td>
<td>$10.5 million</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rx Sales</td>
<td>$10.5 million</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of Rx Jobs/Day</td>
<td>450</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of Uncut Jobs</td>
<td>30%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Specializes in free-form, digital surfacing. Proprietary products include Perfection FF lens, Perfect Ion AR coating. Offers Perfect Academy educational event.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COMPANY NAME</th>
<th>FOUNDED</th>
<th>HQ./MAIN LAB LOCATION</th>
<th>NO. OF LOCATIONS</th>
<th>NO. OF EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>RELIABLE OPTICS</td>
<td>2007</td>
<td>Brooklyn, N.Y.</td>
<td>1</td>
<td>50</td>
</tr>
<tr>
<td>Key Executives</td>
<td>Howard S. Fried, OD; Edward Purman</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td>Howard S. Fried, OD; Edward Purman, Lenny Berenzon, Michael Shur</td>
<td></td>
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</tr>
<tr>
<td>Trade Names</td>
<td>none</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Markets</td>
<td>N.Y., N.J., Conn.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009 Est. Net Sales</td>
<td>$4.8 million</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rx Sales</td>
<td>$4.6 million</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of Rx Jobs/Day</td>
<td>650</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of Uncut Jobs</td>
<td>60%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Proprietary products include Crystal Allure and Crystal AR coating, both produced in-house. Special services include high-end edging and drill mounting.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COMPANY NAME</th>
<th>FOUNDED</th>
<th>HQ./MAIN LAB LOCATION</th>
<th>NO. OF LOCATIONS</th>
<th>NO. OF EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITE-STYLE OPTICAL</td>
<td>1948</td>
<td>Omaha, Neb.</td>
<td>1</td>
<td>105</td>
</tr>
<tr>
<td>Key Executives</td>
<td>George Lee, CEO; Larry Lee, president</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td>Lee family</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trade Names</td>
<td>RSO Advante AR, Rite</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Independent Lab Advantage
In today’s highly competitive marketplace, forging a closer relationship with your independent wholesale laboratory and your suppliers is key to making your business successful. Optical Synergies forms an alliance with its 75 member laboratories, offering a forum for the exchange of information, ideas and cost savings from its suppliers. In turn, the benefits of this alliance are passed on to the customers of your laboratory.

For additional information, please call Optical Synergies
700 Twelve Oaks Center Drive, Suite 726 Wayzata, MN 55391
TOLL FREE: (800)305-2082 FAX: (800)350-3233 • www.opticalsynergies.com
Continued from page 47

Protect

**Key Markets:** Midwest, Texas
**2009 Est. Net Sales:** $19.1 million
**Rx Sales:** $18.1 million
**No. of Rx Jobs/Day:** 1,126
**Percentage of Uncut Jobs:** 31%
**Comments:** Independent industry leader in freeform technology, featuring in-house production of all Shamir Autograph II products. Proprietary AR, Zeiss and Kodak CleAR coatings produced in-house. Online ordering, lens tracing and job status tracking offered. 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.robertsonoptical.com

**ROBERTSON OPTICAL LABORATORIES**

**Founded:** 1958
**H.Q./Main Lab Location:** Loganville, Ga.

**No. of Locations:** 3
**No. of Employees:** 110

**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, Ill

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

**Key Markets:** Southeastern U.S.

**2009 Est. Net Sales:** $16.1 million
**Rx Sales:** $15.3 million
**No. of Rx Jobs/Day:** 1,400
**Percentage of Uncut Jobs:** 26%


www.robertsonoptical.com

**THREE RIVERS OPTICAL**

**Founded:** 1969
**H.Q./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

**2009 Est. Net Sales:** $21.2 million
**Rx Sales:** $20.2 million
**No. of Rx Jobs/Day:** 1,850
**Percentage of Uncut Jobs:** 55%

**Comments:** Operates in-house AR coating facility; offers major lens brands including Varilux, Zeiss, Crizal, Kodak, Transitions. Manufactures Shamir Freeform progressive lenses. Produces proprietary TR 0 Seg bifocal polycarbonate in Transitions and TR 0 Blended Seg. Offers private label Discovery brand progressive lens. Primary frame brands include Zyloware and McGee Group.

www.3riversoptical.com

**US OPTICAL**

**Founded:** 2008
**HQ./Main Lab Location:** East Syracuse, N.Y.

**No. of Locations:** 1
**No. of Employees:** 35

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

**Owners:** Robert Cotran, Ronald Cotran, Ralph Cotran

**Trade Names:** none

**Key Markets:** National

**2009 Est. Net Sales:** $9.8 million
**Rx Sales:** $9.8 million
**No. of Rx Jobs/Day:** 710
**Percentage of Uncut Jobs:** 60%

**Comments:** All surfacing is 100% digital. Proprietary products include free-form Seiko, Shamir and Indo lenses, and customized free-form Zeiss lenses and
Top 5 Labs That Made News in 2009

NEW YORK—Although the Top 5 supplier-owned U.S. lab networks collectively grew their sales in both dollars and units in 2009, three lab groups in particular—Essilor, Carl Zeiss Vision Laboratories and VSP Optical Laboratories, stood out.

Essilor reported Rx sales of $880.1 million, up 9.5 percent from 2008. Carl Zeiss posted Rx sales of 142.5 million, up 7.4 percent from year ago. VSP Optical Laboratories experienced an 18.2 percent rise in Rx jobs per day, although Rx sales were flat.

Hoya Vision Care reported a 16.9 percent decrease in Rx sales; Rx jobs per day were down 13.5 percent. At Nassau Vision Group Laboratories, both Rx sales and Rx jobs per day were flat compared with a year ago.

On the mergers and acquisitions front, Essilor led the group, adding 12 U.S. labs to its roster. In February, Essilor reported that it acquired at least a majority interest in Pech Optical in Iowa ($37 million in revenue); SouthWest Lens in Texas ($5 million); and Collard Rose Optical Laboratory in California ($7.5 million), Next Generation Ophthalmics in Minnesota ($3.5 million in revenue), Dependable Optics in New York State (about $2 million), and Hi-Tech Optical and Pinnacle, two Nebraska-based labs with a combined revenue of $3 million. The acquisitions represented an aggregate full-year revenue of some $60 million, according to Essilor.

In March, Carl Zeiss Vision opened Carl Zeiss Vision—Texas, a full-service, VSP-approved laboratory co-located within the Legends VSP laboratory based in Lewisville, Texas. The lab offers the full range of Carl Zeiss Vision products, including Zeiss Individual and Zeiss GT2 3D customized progressive lenses, Teflon Clear Coat Lenses and Zeiss AR coatings.

In July, Essilor joined for the first time with Vision Service Plan (VSP) to acquire a lab, McLeod Optical, a Rhode Island-based wholesaler with 2008 revenue of $10 million. Essilor has a majority interest and VSP and the principals of McLeod each own a minority interest in the company. At the same time, Essilor announced that it had also acquired Barnet & Ramel Optical ($10.8 million in revenue), Apex Optical ($2.7 million), ABBA Optical ($2.2 million) and Vision Pointe Optical ($1.1 million). The four prescription laboratories are located respectively in Nebraska, Florida, Georgia and Idaho.

In a related move, Essilor also acquired a majority stake in OptiSource International ($5.3 million in revenue), which manufactures and distributes optical supplies and consumables for opticians and laboratories.

VM’s Top 5 Supplier-Owned U.S. Lab Networks ’09 Rx Sales

<table>
<thead>
<tr>
<th>Rank</th>
<th>Lab Name</th>
<th>’09 Rx Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Essilor</td>
<td>$880.1</td>
</tr>
<tr>
<td>2</td>
<td>Hoya Vision Care Laboratories</td>
<td>174.2</td>
</tr>
<tr>
<td>3</td>
<td>Carl Zeiss Vision Laboratories</td>
<td>142.5</td>
</tr>
<tr>
<td>4</td>
<td>VSP Optical Laboratories*</td>
<td>68.4</td>
</tr>
<tr>
<td>5</td>
<td>Nassau Vision Group Laboratories</td>
<td>28.7</td>
</tr>
</tbody>
</table>

VM’s Top 5 Supplier-Owned U.S. Lab Networks ’09 Rx Jobs/Day

<table>
<thead>
<tr>
<th>Rank</th>
<th>Lab Name</th>
<th>’09 Rx Jobs/Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Essilor</td>
<td>64,500</td>
</tr>
<tr>
<td>2</td>
<td>Carl Zeiss Vision Laboratories</td>
<td>10,500</td>
</tr>
<tr>
<td>3</td>
<td>Hoya Vision Care Laboratories</td>
<td>10,400</td>
</tr>
<tr>
<td>4</td>
<td>VSP Optical Laboratories*</td>
<td>5,000</td>
</tr>
<tr>
<td>5</td>
<td>Nassau Vision Group Laboratories</td>
<td>3,000</td>
</tr>
</tbody>
</table>

Source: Vision Monday
*Does not include contract labs
Einstein once said that the sign of intelligence is imagination. With the changing landscape of the optical marketplace, you need to think creatively to stay ahead. That's why you need JOBSON OPTICAL RESEARCH – the leading thinktank of the optical world.
# The Top 25 Independent Labs in 2009 At a Glance

<table>
<thead>
<tr>
<th>Lab</th>
<th>Net Sales</th>
<th>Rx Sales (% of Net)</th>
<th>Rx Sales*</th>
<th>Rxs Per Day</th>
<th>% of Uncuts</th>
<th># of Employees</th>
<th>Year in Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walman Optical</td>
<td>224.0</td>
<td>43</td>
<td>96.0</td>
<td>6,600</td>
<td>20</td>
<td>840</td>
<td>95</td>
</tr>
<tr>
<td>Luzerne Optical</td>
<td>31.7</td>
<td>97</td>
<td>30.7</td>
<td>1,900</td>
<td>56</td>
<td>200</td>
<td>36</td>
</tr>
<tr>
<td>CSC Laboratories</td>
<td>28.5</td>
<td>90</td>
<td>25.2</td>
<td>1,650</td>
<td>30</td>
<td>165</td>
<td>41</td>
</tr>
<tr>
<td>ICare Labs</td>
<td>21.5</td>
<td>95</td>
<td>20.5</td>
<td>2,150</td>
<td>50</td>
<td>115</td>
<td>41</td>
</tr>
<tr>
<td>Three Rivers Optical</td>
<td>21.2</td>
<td><strong>95</strong></td>
<td>20.2</td>
<td>1,850</td>
<td>55</td>
<td>68</td>
<td>40</td>
</tr>
<tr>
<td>Rite-Style Optical</td>
<td>19.1</td>
<td>95</td>
<td>18.1</td>
<td>1,126</td>
<td>31</td>
<td>105</td>
<td>61</td>
</tr>
<tr>
<td>Expert Optical</td>
<td>19.0</td>
<td>90</td>
<td>17.1</td>
<td>930</td>
<td>20</td>
<td>92</td>
<td>30</td>
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<tr>
<td>Robertson Optical</td>
<td>16.1</td>
<td>90</td>
<td>15.3</td>
<td>1,400</td>
<td>26</td>
<td>102</td>
<td>52</td>
</tr>
<tr>
<td>MJ Optical</td>
<td>15.8</td>
<td>90</td>
<td>14.2</td>
<td>1,590</td>
<td>43</td>
<td>82</td>
<td>21</td>
</tr>
<tr>
<td>Diversified Ophthalmics Laboratory Group</td>
<td>30.6</td>
<td>43</td>
<td>13.2</td>
<td>1,005</td>
<td>20</td>
<td>101</td>
<td>32</td>
</tr>
<tr>
<td>Balester Optical</td>
<td>13.5</td>
<td>96</td>
<td>13.0</td>
<td>858</td>
<td>55</td>
<td>91</td>
<td>75</td>
</tr>
<tr>
<td>Classic Optical</td>
<td>12.5</td>
<td>99</td>
<td>12.4</td>
<td>1,900</td>
<td>10</td>
<td>90</td>
<td>39</td>
</tr>
<tr>
<td>Hirsch Optical</td>
<td>13.0</td>
<td>93</td>
<td>12.1</td>
<td>800</td>
<td>35</td>
<td>54</td>
<td>32</td>
</tr>
<tr>
<td>Precision Optical Group</td>
<td>14.5</td>
<td>80</td>
<td>11.6</td>
<td>1,300</td>
<td>60</td>
<td>90</td>
<td>17</td>
</tr>
<tr>
<td>Brothers' Optical Laboratory</td>
<td>11.5</td>
<td>100</td>
<td>11.5</td>
<td>550</td>
<td>23</td>
<td>59</td>
<td>36</td>
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<tr>
<td>FEA Industries</td>
<td>10.9</td>
<td>100</td>
<td>10.9</td>
<td>1,430</td>
<td>90</td>
<td>51</td>
<td>25</td>
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<tr>
<td>Perfect Optics</td>
<td>10.5</td>
<td>100</td>
<td>10.5</td>
<td>450</td>
<td>30</td>
<td>58</td>
<td>3</td>
</tr>
<tr>
<td>Winchester Optical</td>
<td>11.1</td>
<td>91</td>
<td>10.0</td>
<td>735</td>
<td>24</td>
<td>80</td>
<td>107</td>
</tr>
<tr>
<td>US Optical</td>
<td>9.8</td>
<td>100</td>
<td>9.8</td>
<td>710</td>
<td>60</td>
<td>35</td>
<td>1</td>
</tr>
<tr>
<td>Toledo Optical</td>
<td>9.3</td>
<td>94</td>
<td>5.30</td>
<td>10</td>
<td>55</td>
<td>55</td>
<td>62</td>
</tr>
<tr>
<td>Harbor Optical</td>
<td>6.7</td>
<td>94</td>
<td>6.3</td>
<td>390</td>
<td>12</td>
<td>43</td>
<td>12</td>
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<tr>
<td>Cherry Optical</td>
<td>6.0</td>
<td>98</td>
<td>5.9</td>
<td>325</td>
<td>20</td>
<td>28</td>
<td>10</td>
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<tr>
<td>Katz &amp; Klein</td>
<td>6.0</td>
<td>95</td>
<td>5.7</td>
<td>401</td>
<td>18</td>
<td>40</td>
<td>72</td>
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<tr>
<td>Optical Precision Lab</td>
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<td>92</td>
<td>4.9</td>
<td>315</td>
<td>30</td>
<td>25</td>
<td>32</td>
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<tr>
<td>Reliable Optics</td>
<td>4.8</td>
<td>95</td>
<td>4.6</td>
<td>650</td>
<td>60</td>
<td>50</td>
<td>2</td>
</tr>
</tbody>
</table>

*This ranking is based on Rx sales and supercedes all previously released rankings. Source: Vision Monday*