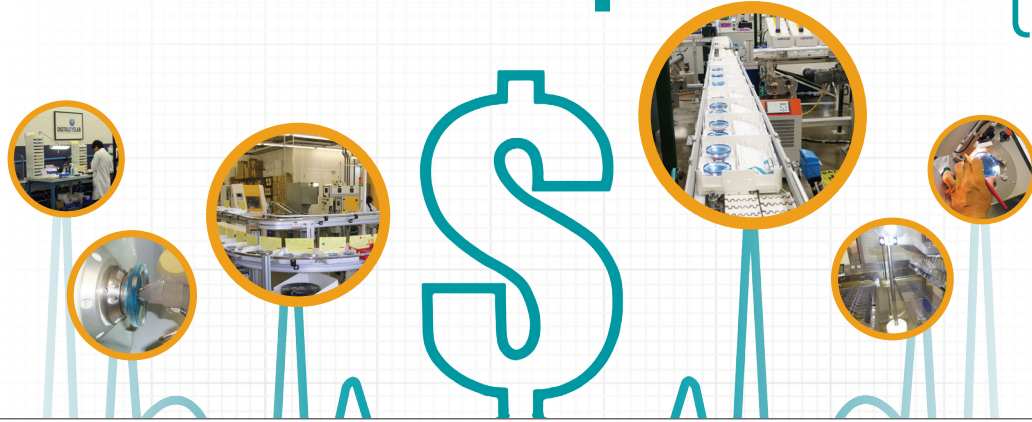


Top Labs Earn High Marks in VM's Annual 'Checkup'



BY ANDREW KARP / GROUP EDITOR, LENSES + TECHNOLOGY

NEW YORK—The history of the modern U.S. wholesale business can practically be summed up with two aphorisms: “If you can’t beat ’em, join ’em,” and “Only the strong survive.”

The first one applies to the dozens of labs that, over the past two decades, have been acquired by suppliers such as Essilor, Hoya and Zeiss. These wholesalers saw an opportunity to grow by vertically integrating themselves with one of the leading spectacle lens manufacturers. Labs that joined a supplier’s network could expect support in the form of capital investment and access to proprietary products and systems which would enable it to operate more efficiently and compete more effectively.

The second applies to the wholesale labs that have remained independent. Some have resisted the pull of the suppliers. Others may not have been courted by suppliers, or perhaps could not cut a deal with them for one reason or another.

Although their numbers are dwindling, due to industry consolidation, these wholesalers have survived by becoming tougher and more nimble. They have adapted to competitive challenges by employing a diverse set of strategies. Some have invested in new technologies. Others have formed alliances with suppliers that are not vertically integrated. All have forged closer relationships with their customers, the independent eyecare professionals and retailers with whom they are interdependent and attitudinally aligned.

Both types of wholesale labs are represented in Vision Monday’s 2017 Top Labs Report. This annual survey, which ranks the industry’s largest labs by Rx sales (pairs of prescription lenses produced) and the number of Rx jobs produced per day, can be viewed as a yearly checkup on the health of the wholesale lab sector. It provides a fresh look at the Top Independent U.S. Wholesale Labs and the Top U.S. Supplier-Owned U.S. Wholesale Lab Networks.

Published annually since 1991, the report also profiles each of the labs. The individual lab profiles indicate the lab’s ownership and key executives, and provide useful details such as their number of locations, number of employees, and proprietary products and special services they offer. This information, if viewed together, creates a rich and varied portrait of a vital sector of the optical industry. ■

More →

Top Labs’ Vital Stats

Supplier-Owned Labs

- Generate total annual Rx sales of \$2.28 billion, up 5.3 percent from 2016.
- Produce 136,500 Rx jobs per day, up 0.8 percent from 2016.
- Employ 10,710 workers, up 2.4 percent from 2016.
- The largest Supplier-Owned Lab Network, Essilor, generates estimated annual Rx sales of \$1.43 billion and produces 87,500 Rx jobs per day at 128 locations with 6,885 employees.
- The smallest Supplier-Owned Lab, Nova Optical, which is owned by Essilor, generates estimated annual Rx sales of \$14 million and produces 1,100 Rx jobs per day at one location with 85 employees.

Independent Wholesale Labs

- Generate total annual Rx sales of \$433.5 million, a 6 percent decrease from 2016.
- Produce 26,640 Rx jobs per day, down 7.3 percent from 2016.
- Employ 2,545 workers, 1.6 percent less than 2016.
- The largest Independent Wholesale Lab in this year’s Top Labs Report, Walman Optical, generates estimated annual Rx sales of \$180 million and produces 8,800 Rx jobs per day from 38 locations with 1,200 employees.
- The smallest Independent Wholesale Lab, Laramy-K Optical, generates estimated Rx sales of \$5.1 million and produces 320 Rx jobs per day at two locations with 26 employees.

Independent Lab Execs Share Views on Business Challenges and Opportunities

NEW YORK—Faced with stiff competition from supplier-owned labs as well as from each other, most independent wholesale labs have learned to adeptly navigate a complex, fast changing market. To get a reading on the current business outlook for independents, VM posed the following questions to three executives from this year's group of Top Independent Labs:

What are the biggest challenges you face as an independent lab owner or manager?



Adam Cherry
President
Cherry Optical, Inc

“The biggest challenge we face at Cherry Optical, Inc is keeping up with educating our customers on all the new products available. Lens manufacturers continue to develop new materials, coatings and designs that improve quality and performance; we just need time to get our customers up to speed. The never-ending pipeline of new products is certainly beneficial, but it does create a bit of “new product” fatigue.

We challenge ourselves a lot, too. Sometimes that's reflected in my desire to invest in technologies that are sometimes on the ‘bleeding edge’ of technology or, more commonly, challenging our production team to be as efficient as possible without sacrificing quality. Producing lenses is easy. Producing high quality lenses is the challenge.”



Bill Heffner
President
FEA Industries

“In today's environment, the need for people has emerged as the greatest challenge for

FEA. Despite the huge investment in the last few years in robotic equipment, skilled people are still needed to keep the work flowing. As the U.S. economy is finally growing after a decade, the available educated work force is now shrinking.

Recently, we opened a training center in our newest facility where we teach the basics of our industry. Our ‘Optics 101’ class discusses the basics of optics and what the different terms mean. More advanced levels include: freeform designs, surfacing process, and coatings and anti-reflective technology. We find that the more our staff knows about and understands the process, the better the process and the quality will be.”



Greg Novak
Chief Operating Officer
Rochester Optical

“We see three main challenges:

1. The growth of ‘virtual labs’ through outsourcing to low cost offshore facilities that are competing in the domestic ECP market.
2. Operating and growing an independent lab has become a capital intensive exercise. Sufficient capital expenditure is necessary to maintain a competitive edge.
3. Communicating to customers, our brand, our commitment to their success, our product and service portfolio amid all of the competing noise in the marketplace, and integrating that communication in everything that we do every day.”

In what parts of your business are you making significant investments, and why?

Adam Cherry

“Capital expense-wise, automation has been our biggest investment area. We're looking to produce as much as possible, as quality as possible, with-

out sacrificing quality. Our goal is never to eliminate current employees with automation. It is to limit the need to be constantly adding employees as we grow.

Redundancy is another area we are investing in, be it for increased throughput or to maintain uptime. Downtime must be avoided as much as possible. Our customers depend upon our service levels and we have made investments to ensure we can deliver.

Sales, marketing and education is another big investment area at Cherry Optical, Inc. I see all of them as one. We've added positions within sales and marketing to better serve our customers and expand our operations into new territories. By hiring professionals with experience in our industry, especially those that have been opticians, we feel we are better able to educate and work with our customers because we all speak the same language.

With marketing, we've invested a lot into our website, video, photography and communication to our customers. We don't want to be known as just an independent lab. The technologies and capabilities we have are the very best available in the world. We need to be able to show current and potential customers that when they work with Cherry Optical, Inc they are working with an extremely capable and enabled optical laboratory.”

Bill Heffner

“Over the last two years, FEA has invested \$3.7 million in various areas. In 2016, we completed construction on our third facility, which is dedicated for stock lenses and finishing. At this time, we also more than doubled our finishing production output by installing additional equipment from MEL.

By March of 2017, we had doubled the output of our surfacing laboratory. This investment brought us up to a total of seven robotic freeform production lines. This helped to streamline our processes,

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Vision Monday's TOP LABS – 2017

(IN ALPHABETICAL ORDER)

Digital Eye Lab (a division of ABB Optical Group)

Founded: 2007

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

No. of Locations: 4

No. of Employees: 230

Key Executives: Angel Alvarez, CEO; Scott Pearl, managing director; Vince Monaghan, VP of manufacturing.

Owner: ABB Optical Group

Trade Names: Digital Eye Lab, Diversified Ophthalmics, MidSouth Premier Ophthalmics, TriOptics

Key Markets: National

2017 Est. Net Sales: \$60 million

Rx Sales: \$60 million

No. of Rx Jobs/Day: 3,250

Percentage of Uncut Jobs: 45%

Comments: Proprietary products include Digital 5.0, Claris: AR, Plus & bluDEFENSE; bluDEFENSE Lens Materials; Digital Mirror Solutions; PureSite family of products. Services and programs include Unity Enabled Lab, Shamir Glacier Fabrication, DEL Rewards Program, EZCONNECT.

www.digitaleyelab.com

Identity Optical (a division of Acuity Optical)

Founded: 2012

HQ./Main Lab Location: Normal, Ill.

No. of Locations: 1

No. of Employees: 65

Key Executives: Peter Kimerling, Dan Stevens, Adam Rosengren, Nick Williams.

Owners: Harlan Hankins, Chad Wolenhaupt

Trade Names: Identity Optical

Key Markets: National

2017 Est. Net Sales: \$8.7 million

Rx Sales: \$8.7 million

No. of Rx Jobs/Day: 850

Percentage of Uncut Jobs: 16%

Comments: Proprietary products include LifeScope, LensScope, OfficeSpace, Serenity NOW, Thermicore HC, Titanium AR.

www.identityoptical.com

Carl Zeiss Vision Laboratories

Founded: 2000

HQ.: San Diego, Calif.

No. of Locations: 13

No. of Employees: 390

Key Executives: (North America) Jens Boy, president; Steve Mitrakos, senior vice president retail; Andrew Hyncik, vice president marketing; Barry Lannon, senior director lab operations.

Owner: Carl Zeiss AG, Germany

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

Key Markets: Nationwide

2017 Est. Net Sales: \$200 million

Rx Sales: \$146 million

No. of Rx Jobs/Day: 10,500

Percentage of Uncut Jobs: 35%

Comments: Zeiss-brand lenses and coatings, Zeiss Individual 2 progressive, DriveSafe lens, EnergizeMe lens, Digital Lens, Officelens, Zeiss PhotoFusion, DuraVision Platinum, DuraVision BlueProtect; synchrony.

www.zeiss.com/lenses

Cherry Optical, Inc

Founded: 1999

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

No. of Locations: 1

No. of Employees: 44

Key Executives: Adam Cherry, Lynn Cherry, Joe Cherry.

Owners: Adam Cherry, Lynn Cherry, Joe Cherry

Trade Names: Raptor Lens, Safety Optix, Producing Vision to the Highest

Definition, Independence & Independence HD, Quantum & Quantum HD,

Cherry Approved AR, BFT – Blue Filter Technology, Safety Optix, eyeRelax HD

Key Markets: Worldwide

2017 Est. Net Sales: \$16.5 million

Rx Sales: \$15.7 million

No. of Rx Jobs/Day: 675

Percentage of Uncut Jobs: 30%

Comments: Offers a wide scope of training and educational services for independent, private practice optometry, such as “What’s New University.”

Proprietary products include Truly Unlimited No-Fault Warranty Policy. Services and programs include AssureAbility, Safety Optix.

<https://cherryopticalinc.com>

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Essilor Laboratories of America (ELoA)

Founded: 1996

HQ./Main Lab Location: Dallas, Texas

No. of Locations: 128

No. of Employees: 6,885

Key Executives: Rick Gadd, president Essilor Lab Group; Mike Atkinson, senior VP industrial operations; Mike Nathe, senior VP partner labs; Paul Owston, VP ECP sales.

Trade Names: 21st Century Optical, ABBA Contact Lens, AccuRX Inc., Advance Optical, Apex, Aspen Optical, Bales-ter, Barnett & Ramel, Bartley Optical, Beitler-McKee Opti-cal, Bell Optical Labs, Bristow Optical, Brothers Optical, Central One Optical, Cherry Optical, Classic Optical, Collard Rose Optical, Crown Optical, CSC, Custom Eyes, Dash Lab, DBL Labs, Deschutes Optical, Duffens Optical, Dunlaw Optical, e.magine, East Coast Ophthalmic, Elite Optical, ELOA Boston, ELOA New Jersey, Empire Optical, Epic Labs, Eyecare Express, Focus Optical, Future Optical FL, Gold Optical, Gulf States Optical, Heard Optical, Hi-Tech, Homer Optical, iCoat, IcareLabs, Jorgenson Optical, Interstate Opti-cal, Kosh Ophthalmic, LensTech, Meridian Optical, McLeod Optical, MGM Optical, Midland Optical, Milroy, NEA Optical, New City Optical, Omega Optical, Omni Optical Lab, Optic Blue, Optical Suppliers Inc., Optical Supply, Opti-Craft, Optogenics of Syracuse, Pech Optical, Perfex Optical, Plunkett Optical, Precision Optical Company, Precision Optics, Premier Optics, Professional Ophthalmic Labs, Reli-able Optics, S&G Optical, Select Optical, Southern Optical, Spectrum Optical, Sunstar Optical, Sutherland Optical, Tri-Supreme, Truckee Meadows, Twin City Optical, Vision Craft, Winchester, WOS Optical, Katz & Klein, Lenco, Opti-Port, LLC, Manhattan Lens Express, Prescription Optical, Sunland Optical, The Lens Connection

Key Markets: Local and National

2017 Est. Net Sales: \$1,488 million

Rx Sales: \$1,428.5 million

No. of Rx Jobs/Day: 87,500

Percentage of Uncut Jobs: 31%

VM's Top Supplier-Owned U.S. Labs 2017 Rx Sales

(\$ millions)

1.	Essilor Laboratories of America	\$1,428.5
2.	Hoya Vision Care	\$351.5*
3.	VSPOne Optical Technology Centers	\$295.0
4.	Carl Zeiss Vision Laboratories	\$146.0
5.	US Optical	\$41.0
6.	Nova Optical Lab	\$14.0

Rx sales data for calendar year 2017 is based on information from a number of sources, which may include interviews with company management, financial disclosure documents and information from knowl-edgeable secondary sources. Companies with the same estimated Rx sales are ranked by Rx jobs per day.

Source: Vision Monday *Estimate

Comments: Proprietary products include Varilux lenses, Crizal UV anti-reflective coatings, DEFINITY Lenses, Kodak Lenses, Shamir Lenses, Xperio UV Polar-ized Lenses, Opti-Fog Lenses, Transitions Photochromic Lenses, Sharpview Anti-Reflective Coat-ing, Airwear Lenses, LiteStyle and Ultra LiteStyle Lenses, Eyezen+ Lenses. Services and programs include PracticeBuilder, MarketBuilder, ECP University, Pair 50, Doctor Driven Process, Essilor Edge, Office Partnership Training, Essilor Experts, T.O.P. Service.

www.essilorlabs.com

Expert Optics

Founded: 1979

HQ./Main Lab Location: Shorewood, Ill.

No. of Locations: 2

No. of Employees: 82

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

VM's Top Supplier-Owned U.S. Labs 2017 Rx Jobs Per Day

1.	Essilor Laboratories of America	87,500
2.	Hoya Vision Care	19,500
3.	VSPOne Optical Technology Centers	15,600
4.	Carl Zeiss Vision Laboratories	10,500
5.	US Optical	2,300
6.	Nova Optical Lab	1,100

Rx jobs per day data is calculated based on a number of sources, which may include interviews with com-pany 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

Owner: Gregory Ruden

Trade names: Expert Best, Expert DNA, Expert Essen-tial, Expert Elite, Elite C, Expert Extreme, Expert Relief, Expert Tween

Key Markets: National

2017 Est. Net Sales: \$22 million

Rx Sales: \$21.3 million

No. of Rx Jobs/Day: 830

Percentage of Uncut Jobs: 25%

Comments: Key U.S. Distributor for Eyesafe Blue Light filtering screen covers for digital devices.

www.expertoptycs.net

Eye Kraft Optical

Founded: 1954

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

No. of Locations: 1

No. of Employees: 54

Key Executives: Floyd Lehne, president; Michael

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VISIONMONDAY.COM

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Moeller, treasurer; Jason Sharpe, vice president.

Owner: Patricia Negaard

Trade Names: DSL, ClearKraftAR, Eyclite Poly

Key Markets: National

2017 Est. Net Sales: \$8.9 million

Rx Sales: \$6.5 million

No. of Rx Jobs/Day: 570

Percentage of Uncut Jobs: 1%

Comments: Full service, VBA-approved lab. Proprietary products include DSL digital lenses, ClearKraft AR coating.

www.eyekraft.com

FEA Industries

Founded: 1984

HQ./Main Lab Location: Morton, Pa.

No. of Locations: 1 (three buildings in Morton, Pa.)

No. of Employees: 77

Key Executives: Chrystal Colflesh, general manager; Chris Heeney, operations manager; William H. Heffner, IV, IT and marketing; John Jorgense, laboratory operations; Sherry Berry, customer service.

Owner: William H. Heffner, III

Trade Names: Independence AR lenses, Eagle free-form lenses, HD bifocals, Constitution free-form

Key Markets: National

2017 Est. Net Sales: \$14.2 million

Rx Sales: \$13.9 million

No. of Rx Jobs/Day: 1,730

Percentage of Uncut Jobs: 86%

Comments: Independent and family owned for 32 years. One of the only labs in U.S. manufacturing glass free-form lenses. Authorized IOT and Signet Armorlite glass free-form. Proprietary products include Independence AR lenses, Constitution free-form lenses, Eagle free-form lenses, HD Multifocals, glass free-form. FEA Industries publishes the quarterly optical journal, OPT Magazine with distribution of 40,000 copies.

www.feaind.com

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VM's Top Independent Wholesale Labs by 2017 Rx Sales

(\$ millions)

1.	Walman Optical	180.0
2.	Digital Eye Lab	60.0
3.	Luzerne Optical	43.7
4.	Expert Optics	21.3
5.	Three Rivers Optical	21.1
6.	Robertson Optical	20.0
7.	Precision Optical Group	15.9
8.	Cherry Optical, Inc	15.7
9.	FEA Industries	13.9
10.	Rochester Optical	9.5
11.	Identity Optical	8.7
12.	Vision Dynamics	6.8
13.	Eye Kraft Optical	6.5
14.	Optical Prescription Lab	5.3
15.	Laramy-K Optical	5.1

Rx sales for calendar year 2017 are based on information from a number of sources, which may include interviews with company management, financial disclosure documents and information from knowledgeable secondary sources. Companies with the same estimated Rx sales are ranked by Rx jobs per day.

Source: Vision Monday

VM's Top Independent Wholesale Labs by 2017 Rx Jobs Per Day

1.	Walman Optical	8,800
2.	Digital Eye Lab	3,250
3.	Luzerne Optical	2,300
4.	Precision Optical Group	2,250
5.	FEA Industries	1,730
6.	Three Rivers Optical	1,600
7.	Robertson Optical	1,550
8.	Identity Optical Lab	850
9.	Expert Optics	830
10.	Vision Dynamics	820
11.	Rochester Optical	750
12.	Cherry Optical, Inc	675
13.	Eye Kraft Optical	570
14.	Optical Prescription Lab	345
15.	Laramy-K Optical	320

Rx jobs per day are 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

VM'S TOP LABS REPORT

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Hoya Vision Care

Founded: 1941

HQ./Main Lab Location: Lewisville, Texas

Locations: 34

Employees: 1,540

Key Executives: Barney Dougher, CEO; Derek Dodge, COO; Jason White, CFO; Grady Lenski, VP marketing; Gregg Fowler, VP sales; Rick Tinson, VP of inventory control; Kraig Black, VP information services, Mike Dougher, VP technology and operations; Don Dakin, director of sales analysis; Greg Hicks, OD, director of professional affairs; Anne Marie Lahr, OD, director of education; Carson Utech, area sales director, Western region; Travis Labreck, area sales director, Eastern region.

Owner: Hoya Corporation

Trade Names: Hoya Atlanta, Hoya Ashville, Hoya Baltimore Service Center, Hoya Birmingham Service Center, Hoya Boise, Hoya Buffalo, Hoya Canada, Hoya Chicago, Hoya Cleveland, Hoya Columbus, Hoya Dallas, Hoya Denver Service Center, Hoya DFW, Hoya Eugene, Hoya Greenboro, Hoya Hartford, Hoya Houston Distribution Center, Hoya IMC Central, Hoya Iowa Service Center, Hoya Knoxville, Hoya Largo, Hoya Las Vegas Service Center, Hoya Lewiston, Hoya Los Angeles, Hoya Minneapolis, Hoya Michigan Service Center, Hoya Mississippi Service Center, Hoya Mobile, Hoya Modesto, Hoya New Orleans, Hoya Phoenix, Hoya Plymouth Safety, Hoya Portland, Hoya Salina Service Center, Hoya San Antonio, Hoya San Diego, Hoya Seattle, Hoya St. Louis

Key Markets: National

2017 Est. Net Sales: \$371 million*

Rx Sales: \$351.5 million*

No. of Rx Jobs/Day: 19,500

Percentage of Uncut Jobs: 20%

Comments: Hoya Vision Care is a nationwide network of full service labs with high performance proprietary free-form lens designs and patented anti-reflective coating technology. Hoya proprietary products: iD Free Form Series: My Style 2, In Style. LifeStyle2 Harmony and Clarity, LifeStyle and Single Vision; iD Screen, Space and Zoom; Array Free-Form Series; iQ Free Form Series: Summit ecp iQ, Summit cd iQ, ST28 iQ, Single Vision; Amplitude Free-Form Series; Distortion Free Optics - Free Form Vision System; Performance Designs: Summit ecp, Summit cd, GP Wide. New Media Optics: SYNC III, SYNC BKS, TACT BKS, TACT. Proprietary lens materials: 1.70, Eyr, 1.67 Eynoa, 1.60 Eyas, 1.53 Phoenix, 1.50.; Proprietary lens coatings: Super HiVision EX3, Super HiVision, Recharge EX3, Recharge, HiVision, View Protect; Diamond Tint UV; Sensity photochromic; Spectagle Pro automated measuring and advanced demonstration; Hoya DF optics in partnership with Advantek; Hoya in Partnership with Frameri interchangeable frame designs. Seiko proprietary products: Seiko Superior, Seiko Summit, Seiko Supernal. Supercede II, Superior SV, Seiko SV HD, Seiko SV Wrap and Seiko Atoric (LX). Proprietary lens materials: Hi-Index 1.67 and Hi-Index 1.74. Proprietary lens coatings: Super Resistant, Super Resistant Blu. Special programs: Seiko Elite.

www.hoyavision.com

Laramy-K Optical

Founded: 1989

HQ./Main Lab Location: Indianola, Iowa

No. of Locations: 2

No. of Employees: 26

Key Executives: Janet Benjamin; John Larson, general manager.

Owners: Janet Benjamin, John Larson, Keith Benjamin

Trade Names: Integrity, Optician Works

Key Markets: Worldwide

2017 Est. Net Sales: \$5.2 million

Rx Sales: \$5.1 million

No. of Rx Jobs/Day: 320

Percentage of Uncut Jobs: 100%

Comments: Family owned and operated. Proprietary products include Integrity Series freeform lenses and AR coatings, including ICE colorless AR and flash mirrors in blue, gold and silver. Services and programs include opticianworks.com optician training (free to lab customers) and free optician training on YouTube. Laramy-K has been producing on-site AR coat-

ings for 17 years and using two Schneider lines to produce on-site freeform lenses for nine years.

www.laramyk.com

Luzerne Optical Laboratories

Founded: 1973

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

No. of Locations: 1

No. of Employees: 225

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

Owner: Dougherty family

Trade Names: TheraBlue, TheraBlue Sun, iFit Dispensing System (iFDS), CrownView, FreeFocus, FeelSoft Plasma Treatment, BlueScreen, Polar365, SightStar, PhotoFashion, DuraCurve, Crizal Easy UV, Crizal Alizé UV, Crizal Avancé UV, Crizal Sunshield UV, Crizal UV with Optifog, Crizal Prevencia, TD2, EVC-enhanced visual clarity, UNITY

Key Markets: National

2017 Est. Net Sales: \$45 million

Rx Sales: \$43.7 million

No. of Rx Jobs/Day: 2,300

Percentage of Uncut Jobs: 45%

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. Leading producer specializes in processing all major brands of free-form progressive lenses in-house, including glass. Offers digital iPad based iFit dispensing system. Manufactures TheraBlue, FreeFocus, SightStar, Polar365, PhotoFashion, Camber, Crossbows, Varilux, Definity, Transitions, Essilor, Shamir, Kodak, Hoya, Seiko, UNITY, Vision-Ease, 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 UV, Alizé UV, Avancé UV, Crizal

*Vision Monday estimates

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Sunshield UV, Crizal UV with Optifog, Crizal Previncia, TD2, UNITY: Classic/Plus/Elite UV, KODAK Clean&CleAR UV, and Mirror coatings. Award-winning in-house gas perm contact lens facility produces custom DuraCurve aspheric GP's. Offers complex wrap Rx sunglass finishing services. Provides advanced remote ordering with RxWizard, VisionWeb, Paradeyes and Eyefinity software via the web. Vendor lab for BLOCK and most major buying groups. VSP & VBA approved lab.

www.LuzerneOptical.com

Nova Optical Lab

Founded: 1996

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

No. of Locations: 1

No. of Employees: 85

Key Executives: Jeff Duncan, president, Nassau Vision Group.

Owner: Essilor of America

Trade Names: Nova Optical

Key Markets: Northeastern U.S.

2017 Est. Net Sales: \$14 million

Rx Sales: \$14 million

No. of Rx Jobs/Day: 1,100

Percentage of Uncut Jobs: 70%

Comments: Proprietary products include Shoreview Digital Lenses, Triumph and Synergy AR Coatings. Services and programs include digital lenses, Crizal and in-house coating, edging services, Eyemed, hassle-free credit policy, BOGO and 10 hours-per-day customer service.

www.nassau247.com

Optical Prescription Lab

Founded: 1977

HQ./Main Lab Location: Pelham, Ala.

No. of Locations: 1

No. of Employees: 23

Key Executives: Brian Conley, director of operations.

Owners: Sherry Pugh, vice president/CEO; Danny Pugh, president

Trade Names: OPL

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

2017 Est. Net Sales: \$5.4 million

Rx Sales: \$5.3 million

No. of Rx Jobs/Day: 345

Percentage of Uncut Jobs: 20%

Comments: The only independent lab still operating in Alabama, Mississippi and North Florida for 40 years. Offers in-house digital processing, in-house Crizal Processincer Center with 24 hour turn-around time. Products include Shamir, Seiko and Varilux digital lenses manufactured in-house. Other products include: BluTech, UNITY, Hoya and Carl Zeiss. Voted "Best Customer Service In Southeast" for four straight years by independent marketing group. Past two-time winner of Transitions Lab of the Year.

www.opticalprescriptionlab.com

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CONGRATULATIONS

WALMAN OPTICAL COMPANY

NAMED VISION COUNCIL'S DIRECTORS' CHOICE 2017

VM'S TOP LABS REPORT

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Precision Optical Group

Founded: 1992

HQ./Main Lab Location: Creston, Iowa

No. of Locations: 4

No. of Employees: 170

Key Executives: Lance Christensen, Judy Hodge, Warren Herron, Bob Sypniewski.

Owner: Mike Tamerius

Trade Names: P.O.G. Labs, OptiCote, CRX Labs

Key Markets: National, Canada, South America

2017 Est. Net Sales: \$24.5 million

Rx Sales: \$15.9 million

No. of Rx Jobs/Day: 2,250

Percentage of Uncut Jobs: 60%

Comments: Full-service lab with custom coating facility. Proprietary products include FOG Free, Tzovorite AR, Zero Glare AR, 4-You Digital. Offers industrial safety program.

www.poglabs.com

Robertson Optical Laboratories

Founded: 1958

HQ./Main Lab Location: Loganville, Ga.

No. of Locations: 3

No. of Employees: 117

Key Executives: Kelly R. Bowling, Calvin W. Robertson, III, Glenn Hollingsworth, director of lab operations, Danny DeVito, VP of sales and marketing, Chuck Bohler, lab manager.

Owners: Kelly R. Bowling, Calvin W. Robertson, III

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

Key Markets: Southeastern U.S.

2017 Est. Net Sales: \$20.6 million

Rx Sales: \$20.0 million

No. of Rx Jobs/Day: 1,550

Percentage of Uncut Jobs: 33%

Comments: Free-form technology and digital grinding labs offering service and quality on CZV Customized lenses, Shamir Freeform lenses, Seiko Freeform lenses, Kodak Freeform lenses, Authorized UNITY distributor, and ROL Coze and Vista Series Freeform lenses. Full service labs servicing SE for over 55 years with new lens products and new technologies. On-site AR coating facilities providing Royal AR coatings, RB Tech, InvigorEyes, Zeiss coatings and in-house mirror coatings. Distributes CZV, Shamir, Seiko, Signet Armorlite, Vision Ease, Younger, Hoya, Essilor and other major lens brands. Approved VSP, VBA, VCP contract labs. Offers frame and lens packages, specializing in three-piece mounts, complex wraps, Chemistri Custom Clips. Member VCA. Offers online ordering and job tracking.

www.robertsonoptical.com

Rochester Optical

Founded: 2001

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

No. of Locations: 1

No. of Employees: 87

Key Executives: Gregory Novak, Thomas Widell, Jeffery LaPlante, and Peter Balash.

Owner: Patrick Ho

Trade Names: Smart Solutions, Smart GOLD, Smart Frames, PolyShade85, High Society, Montreaux Eyewear and ROMCO

Key Markets: Worldwide

2017 Est. Net Sales: \$16.2 million

Rx Sales: \$9.5 million

No. of Rx Jobs/Day: 750

Percentage of Uncut Jobs: 50%

Comments: Leader in optics and accessories for the wearable technology market segment. Proprietary products include Smart GOLD lenses for Smart Glasses, RO Digital Free Form Lenses, Old Diamante AR

Coating, Polshade85, and Sun Lenses, Under Rx Frames. Services and programs include supplying state and federal agencies, ECPs and corporate customers with optical eyewear necessities.

www.rochesteroptical.com

Three Rivers Optical

Founded: 1969

HQ./Main Lab Location: Pittsburgh, Pa.

No. of Locations: 1

No. of Employees: 70

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

Owner: Seibert Family

Trade Names: None

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

2017 Est. Net Sales: \$22.2 million

Rx Sales: \$21.1 million

No. of Rx Jobs/Day: 1,600

Percentage of Uncut Jobs: 45%

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

www.3riversoptical.com

US Optical

Founded: 2008

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

No. of Locations: 1

No. of Employees: 140

Key Executives: Ralph Cotran, Ron Cotran, and Robert Cotran.

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Owner: Essilor

Trade Names: Fastest Lab in America!

Key Markets: National

2017 Est. Net Sales: \$41.0 million

Rx Sales: \$41.0 million

No. of Rx Jobs/Day: 2,300

Percentage of Uncut Jobs: 60%

Comments: Proprietary products include Ultimate HD, Advanced HD, Wrap HD, PC HD, SV HD, SVWrap HD, PC HD and Digital AR coating. Offers Varilux S series, Comfort and Physio digital HD and traditional lenses; Zeiss, Hoya, Shamir, Seiko, Kodak, Crizal, Purecoat, Optifog Previncia, Blutech, Duravision Silver, Thin Wrap.

www.usoptical.com

VSPOne Optical Technology Centers

Founded: 1972

HQ./Main Lab Location: Sacramento, Calif.

No. of Locations: 15

No. of Employees: 1,200

Key Executives: Don Oakley, president; Randy Dannewitz, senior VP marketing, product and education; Dave Delle Donne, senior VP commercial markets – West; Edward Morris, senior VP commercial markets – East; Joe Maris, senior VP lab Operations; Swen Carlson, VP West region; Danny Singer, VP East region.

Owner: Vision Service Plan

Trade Names: VSPOne Columbus, VSPOne Sacramento, VSPOne Dallas, VSPOne Fort Lauderdale, VSPOne Tampa Bay, VSPOne Olympia, VSPOne San Diego, VSPOne Hawaii, VSPOne St. Cloud, VSPOne Denver, VSPOne Baltimore, VSPOne Los Angeles, VSPOne New York, VSPOne Charlotte, VSPOne Houston, UNITY Via, UNITY Via Plus, UNITY Via Extreme, UNITY Via Elite, UNITY PLx, UNITY PLxtra, UNITY PLxpression with Cascade Technology, UNITY PLxtreme, and Ethos Progressive Lenses, UNITY SVx Single Vision, UNITY SVxtra Single Vision, UNITY SVxtreme Single Vision, UNITY CVx and CVxpression Computer Lenses, UNITY Performance Coatings, TechShield and sunsync light-reactive lenses.

Key Markets: National

2017 Est. Net Sales: \$311 million

Rx Sales: \$295 million

No. of Rx Jobs/Day: 15,600

Percentage of Uncut Jobs: 15%

Comments: Proprietary products include UNITY Via, UNITY Via Plus, UNITY Via Extreme, UNITY Via Elite, UNITY PLx, UNITY PLxtra, UNITY PLxpression with CASCADE TECHNOLOGY, UNITY PLxtreme, and Ethos Progressive Lenses, UNITY SVx Single Vision, UNITY SVxtra Single Vision, UNITY SVxtreme Single Vision, UNITY CVx and CVxpression Computer Lenses, UNITY Performance Coatings, TechShield and sunsync light-reactive lenses. Service and programs include VSPOne Rewards Program, Second Pair Program, on-site AR including UNITY Performance Coatings, Crizal, Purecoat, Teflon, and Zeiss. In-network digital (customized/freeform) surfacing capabilities producing UNITY, Hoya, Shamir, SOLA, Varilux and

Zeiss customized progressives and UNITY Digital 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.VSPone.com

Vision Dynamics Laboratory

Founded: 2007

HQ./Main Lab Location: Louisville, Ky.

No. of Locations: 1

No. of Employees: 75

Key Executives: John Dippold, president; Mike Yager, VP sales, Eric Lindquist, national account manager.

Owners: Robert Miniutti, Jeffrey Plank

Trade Names: Vision Dynamics, Vision Dynamics Laboratory

Key Markets: National

2017 Est. Net Sales: \$11.4 million

Rx Sales: \$6.8 million

No. of Rx Jobs/Day: 820

Percentage of Uncut Jobs: 40%

Comments: Proprietary products include permaTINT, amplifEYE, sunSMART, clearLIGHT, ultraSUN, blueVIEW. Services and programs include glass, pre-tinted 1.67, Trivex, poly, photochromic, color enhancing sun lens.

www.visdynlab.com

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Independent Lab Execs Share Views on Business Challenges and Opportunities

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giving us robotic machinery in almost every aspect of surfacing—such as blocking, cutting, polishing, lasering, cleaning, coating, inspection and progressive ink marking.

The most impressive machine that we added this year is the Schneider LCU 300, a 25-foot-long automated lens cleaning system. This machine takes the lenses out of the tray, cleans them, removes the factory ink markings, then puts the lenses back into the tray at a rate of 300 lenses per hour. This system has eliminated lens scratches from manual cleaning, but also dramatically improved our spin coating yields since the lenses are perfectly clean. This machine has removed the need for pre-cleaning lenses, and also saves time and minimizes the need for manually cleaning lenses and removing ink.”

Greg Novak

“We’re investing in technology to improve quality, accelerate turnaround time and produce industry leading products, specifically premium AR and hard coatings. Because providing our customers with expansive product selection, at a range of price and quality options that meet our customer’s needs is one driving force at Rochester Optical.

We’re also investing in customer interface technology. From telephone, EDI and learning management systems to improve daily customer interactions, to call center technology, quality information management and service systems to corrective action processing which are all designed with one simple thought in mind: make every touch point with every customer more effective, efficient and, ultimately, enjoyable.

Finally, we’re investing in wearable technology, because wearable technology needs optical expertise. Soon our customers will need our help with the optical expertise required to truly make use of this explosive technology.”

What growth opportunities do you see for independent labs?

Adam Cherry

“It starts with being a great laboratory. But being independent is not enough.

When the news of Essilor acquiring Luxottica first broke, there was a

wave of optimism among independents. We didn’t get caught up in that. I knew that the emotion of the news would quickly fade.

At the end of the day, growth opportunities are achieved through constant improvement and market positioning. Independent laboratories need to better. Much better. If they can do that, they’ll be dramatically successful.”

Bill Heffner

“The market is currently in upheaval. Consolidations will continue which will eliminate choice. Insurance providers are going direct to the consumer. Other manufacturers are purchasing their customer base by offering large cash incentives if they sign a five-year purchase agreement.

Despite these factors, independents have the opportunity to build personal relationships with their customers. They can react more quickly to their customer’s needs. They offer more choice since they represent many lens manufacturers, not just one.

Many independents have developed and exploited niches that make them unique. For example, at FEA Industries, we are the only laboratory manufacturing glass freeform lenses in the U.S. I believe there is a bright future for the independent.”

Greg Novak

“In a stable market, growth opportunity comes from either taking market share or new product innovation. Our commitment to improving products and services are key initiatives toward that end. Our new tag line is, ‘Better Together—You And Rochester Optical.’ It reflects our sincere belief that if we help to make our clients successful, they will in turn make us successful.”

akarp@jobson.com

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Vision Monday's Top Labs

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Walman Optical Company

Founded: 1915

HQ./Main Lab Location: Minneapolis/St. Paul, Minnesota

No. of Locations: 38

No. of Employees: 1,200

Key Executives: Marty Bassett, president/CEO; Dustin LaValley, VP/CFO; Derrell James, VP; Doug Schlauderaff, EVP; Lynn Askew, VP; Jon Dymit, VP; Bryan Schueler, VP; Jobe Sellers, VP; Dominick Sblendorio, VP.

Owner: Employee-owned

Trade Names: ADO Practice Solutions, Eye Care Alli-

ance, ImageWear, Walman Instruments, Nouveau Eyewear, Walman Optical, X-Cel Specialty Contacts, Ultra Optics

Key Markets: National

2017 Est. Net Sales: \$400 million

Rx Sales: \$180 million

No. of Rx Jobs/Day: 8,800

Percentage of Uncut Jobs: 10%

Comments: Proprietary frame brands include Revolution, Callaway, London Fog, Stepper Eyewear, Betsey Johnson, Wildflower, Nickelodeon, RealTree, Van Heusen, Kay Unger, Wrangler and Caravaggio. Proprietary Power digital lenses. Proprietary contact lens brands include FlexLens, Altantis Scleral and Extreme H2O. SpecTech digital measurement and lens demonstrative device. Services and programs include state of the art

digital surfacing and non-glare capabilities, producing Varilux, Shamir, Zeiss, Seiko and digital house brand lenses on-site, as well as Crizal, Zeiss, Sentinel Plus UV and Retinel Bliss DES, non-glare coatings. Provider lab network for both VSP and EyeMed orders. Online Rx order submissions accepted through major portals including DVI Rx Wizard, Eyefinity and Vision-Web. ADO member programs by ADO Practice Solutions include DONE4U marketing, Member Metrics Powered by Glimpse, and PEAK Performance Network. Produces educational seminars including Walman U, X-Cel University and ADO member meetings. Industry's largest independent consultative sales force. Member of Transitions Heritage Labs.

www.walman.com ■

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