

TOUGHING IT OUT

Top Labs Show Resilience in Uphill Market

**TOP
LABS**
VISION
MONDAY 2009

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BY ANDREW KARP
**GROUP EDITOR, LENSES
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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.

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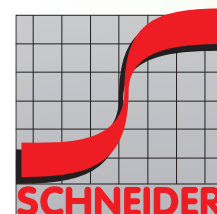
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The WECO EDGE 950 exhibits an **equal balance of power and control** — suitable for cutting all lens materials. It possesses the muscle and through-put to handle your production needs, yet maintains the finesse to handle hydrophobic coated lenses easily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

VM's Top Labs Performance Analysis

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

	2009 (\$millions)	2008 (\$millions)	% change
Total Net Sales	\$1,477.0	\$1,409.0	+4.6
Total Rx Sales	\$1,293.9	\$1,229.2	+5.0
Avg. Rx Sales as Percentage of	91.5%*	93.5%*	-2.2
Total Rx Jobs Per Day	93,400	91,800	+1.7
Avg. Percent of Uncuts	36.2%	36.4%	-0.6
Total Number of Lab Locations	175	172	+1.7
Total Number of Employees	9,170	8,910	+2.8

VM's Top 25 Independent Wholesale Labs

	2009 (\$millions)	2008 (\$millions)	% change
Total Net Sales	\$544.4	\$567.4	-4.2
Total Rx Sales	\$408.8	\$417.0	-2.0
Avg. Rx Sales as Percentage of	94.5%**	92.6%***	+2.0
Total Rx Jobs Per Day	31,545	31,935	-1.2
Avg. Percent of Uncuts	35.5%	32.0%	+9.9
Total Number of Lab Locations	75	73	+2.7
Total Number of Employees	2,694	3,024	-12.2

*Does not include Nassau Vision Group Laboratories, which has Rx sales of 35 percent; remaining 65 percent of Nassau's Total Net Sales are from lens business. **Does not include Walman Optical or Diversified Ophthalmics, both of which have Rx sales of 43 percent; remaining 53 percent of Walman's and Diversified's Total Net Sales are from various other products and services. ***Does include Walman Optical as per above. Source: Vision Monday

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Vision Monday's TOP LABS – 2009

(IN ALPHABETICAL ORDER)

BALESTER OPTICAL

Founded: 1934

HQ./Main Lab Location: Wilkes-Barre,

Pa.No. of Locations: 1

No. of Employees: 91

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 Hodle, Jonathan Balester, Marc Balester, William Balester, Heather Balester, Fred P. Balester, Jacqueline Pekar

Trade Names: Balester Optical

Key Markets: Eastern U.S.

2009 Est. Net Sales: \$13.5 million

Rx Sales: \$13.0 million

No. of Rx Jobs/Day: 858

Percentage of Uncut Jobs: 55%

Comments: In-house AR brands: Crizal, Crizal Alize, Crizal Avance with Scotchgard, Zeiss Super ET Plus, Carat Advantage and Essilor's House Ez. Lens brands: Varilux, Definity, Transitions, Kodak, SunSensors, Hoya, Shamir, Zeiss, Seiko, Pentax, NuPolar, Xperio, Coppertone, iRx, EOS, Sun Rx, Phoenix, Trilog, Instashades, Life Rx, AO Compact Ultra. Frame Brands: Stetson, Sophia Loren, Randy Jackson, Via Spiga, Bulova, BUM, Just-Match-It, Bratz, Nickelodeon, Austin Reed, Manish Arora, Mayhem, Conran. Other Products: Smart Mirror, Smart Look, Smart Centration, Wink Pad, Y-Stick. Programs include Balester Dispenser Awards (Transitions), Value, Kid's & Drilled Rimless Packages, 2nd Pair Program, Balester Direct Rx Program, Balester Back to School Program, Superstar Frame, I-Sport Rec Specs Lab, Board Management Program, \$2,000 Minute ABO-Certified Education Series, CPR ABO Training. 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 Market: California, Arizona, Las Vegas, Oregon, Hawaii

2009 Est. Net Sales: \$11.5 million

Rx Sales: \$11.5 million

No. of Rx Jobs/Day: 550

Percentage of Uncut Jobs: 23%

Comments: Well-established, full-service lab

www.brothersoptical.com

CSC LABORATORIES

Founded: 1967

HQ./Main Lab Location: Watsonville, Calif.

No. of Locations: 2

No. of Employees: 165

Key Executives: 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

Owner: Dong Kook Kim

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

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

2009 Est. Net Sales: \$28.5 million

Rx Sales: \$25.6 million

No. of Rx Jobs/Day: 1,650

Percentage of Uncut Jobs: 30%

Comments: 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, Millenia 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 Z87-1 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.

www.csclabs.com

CARL ZEISS VISION LABORATORIES

Founded: 2000

HQ.: San Diego, Calif.

No. of Locations: 18

No. of Employees: 1,090

Key Executives: Fred Howard, Dave Delle Donne, David Jochims

Owner: Carl Zeiss Vision

Trade Names: Carl Zeiss Vision—B&W,

Key Executives: Fred Howard, 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 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

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%

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"

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VM's Top 25 Independent Wholesale Labs by '09 Rx Sales

1	Walman Optical	96.0
2	Luzerne Optical	30.7
3	CSC Laboratories	25.6
4	ICare Labs	20.5
5	Three Rivers Optical	20.2
6	Rite-Style Optical	18.1
7	Expert Optical	17.1
8	Robertson Optical	15.3
9	MJ Optical	14.2
10	Diversified Ophthalmics	13.2
11	Balester Optical	13.0
12	Classic Optical	12.4
13	Hirsch Optical	12.1
14	Precision Optical Group	11.6
15	Brothers' Optical Laboratory	11.5
16	FEA Industries	10.9
17	Perfect Optics	10.5
18	Winchester Optical	10.0
19	US Optical	9.8
20	Toledo Optical	8.7
21	Harbor Optical	6.3
22	Cherry Optical	5.9
23	Katz & Klein	5.7
24	Optical Prescription Lab	4.9
25	Reliable Optics	4.6

VM's Top 25 Independent Wholesale Labs by '09 Rx Jobs/Day

1	Walman Optical	6,600
2	ICare Industries	2,150
3	Luzerne Optical	1,900
4	Classic Optical	1,900
5	Three Rivers Optical	1,850
6	CSC Laboratories	1,650
7	MJ Optical	1,590
8	FEA Industries	1,430
9	Robertson Optical	1,400
10	Precision Optical Group	1,300
11	Rite-Style Optical	1,126
12	Diversified Ophthalmics	1,005
13	Expert Optical	930
14	Balester Optical	858
15	Hirsch Optical	800
16	Winchester Optical	735
17	US Optical	710
18	Reliable Optics	650
19	Brothers' Optical Laboratory	550
20	Toledo Optical	530
21	Perfect Optics	450
22	Katz & Klein	401
23	Harbor Optical	390
24	Cherry Optical	325
25	Optical Prescription Lab	315

Rx sales estimates for calendar year 2009 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. This ranking supercedes all previously released rankings. Source: Vision Monday



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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

DIVERSIFIED OPHTHALMICS LABORATORY GROUP

Founded: 1977

H.Q./Main Lab Location: Cincinnati, Ohio

No. of Locations: 13

No. of Employees: 115

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

Key Markets: Ga. Idaho, Ind., Ky., La., Mich., Mont., N.C., Pa., Ohio, S.C., Tenn., Texas, Utah, Wash., Wis., W.Va.

2009 Est. Net sales: \$30.6 million

Rx Sales: \$13.2 million

No. of Rx Jobs/Day: 1,005

Percentage of Uncut Jobs: 20%

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. Proprietary products include PureSite Lenses, PureSite Preference AR and Practice Maximus. Specializes in premium lenses. Offers eyeglass and contact lens packages, Perfect View frame-and-lens value packages, certified continuing education seminars and staff training. On-line and electronic ordering, remote frame tracing. Services/programs include Frames Travel Programs, Transitions Day at the Races, Seminars, RIP, Perfect View, DBAN, Eye to the Sky. Member of the OLA and AR Council. 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

Trade Names: 21st Century Optical, AccuRX Inc., ACO, Aspen Optical, Avisia,

Bartley Optical, Beitler-McKee Optical, Bell Optical, Bristow Optical, Collard Rose Optical, Crown Optical, Custom Eyes, 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, GK Optical, Heard Optical, Homer Optical, Jorgenson Optical, Interstate Optical, Kosh Ophthalmic, Meridian Optical, MGM Optical, Midland Optical, Milroy Optical, New City Optical, Omega Optical, Omni Optical Lab, Opal-Lite, Optical One, Optical Suppliers Inc., Optical Supply, Opti-Craft, Optogenics of Syracuse, Ozarks Optical, Pech Optical, Perferx Optical, Peninsula Optical, Personal Eyes Optical. Precision Optical Company, Precision Optics, Premier Optics, S&G Optical, Select Optical, Southern Optical, Select Optical.Southern Optical, Southwest Lens, Spectrum Optical, Sunstar Optical, Sutherlin Optical, Top Network, Tri-Supreme, Twin City Optical, Vision Craft Inc., WOS Optical

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.eloa.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.expertoptycs.net

FEA INDUSTRIES

Founded: 1984

HQ./Main Lab Location: Morton, Pa.

No. of Locations: 1

No. of Employees: 51

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

Owner: William H. Heffner, III

Trade Names: none

Key Markets: national

2009 Est. Net Sales: \$10.9 million

Rx Sales: \$10.9 million

No. of Rx Jobs/Day: 1,430

Percentage of Uncut Jobs: 90%

Comments: Full-service lab offering in-house AR, glass lens processing. Web site includes ordering, tracking reports, invoices. Offers Kodak CleAR, special stock lens program. 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: 43

Key Executives: Bob Westlake, Mike Earl

Owner: Geff Heidbrink

Trade Names: Armorcoat, Esceed, Exceed XTC

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

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%

Comments: Extensive offerings of lens and frame package programs. Offers proprietary AR coatings applied in-house: CHAD (Clear, Hard, Anti-Reflective, Durable) and premium coating Super CHAD. 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, Dockers, Donald J. Trump, Elizabeth Arden, Elizabeth Arden Petites, Essence Eyewear, Hershey's Eyewear, Jill Stuart Eyewear, Levi's, Liberty Rec Specs, Marco Polarized Sunwear, Mount Eyewear (stainless steel, titanium, polarized sport), New Balance, New Balance Kids, Perry Ellis, Stylewise, Scooby-Doo! And Stuff By Hilary Duff. 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

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

regional VP; Terry Farrell, Southwest regional VP; Iggy Fernandez, central regional VP; Don Dakin, Southwest regional VP; Michael Ness, director, new product development.

Owner: Hoya Corporation

Trade Names: Hoya Atlanta, Hoya Boise, Hoya Chicago, Hoya Cleveland, Hoya Dallas, Hoya Dayton, Hoya Eugene, Hoya Hartford, Hoya Knoxville, Hoya Largo, Hoya Lewiston, Hoya Los Angeles, Hoya Modesto, Hoya New Orleans, Hoya Portland, Hoya St. Louis, Hoya San Antonio, Hoya San Diego, Hoya Seattle

Key Markets: National

2009 Est. Net Sales: \$205.0 million

Rx Sales: \$174.2 million

No. of Rx Jobs/Day: 10,400

Percentage of Uncut Jobs: 20%

Comments: Nationwide network of full-service labs. Proprietary lens designs: Hoyalux iD, Hoyalux iD LifeStyle, Hoyalux Summit ecp, Hoyalux Summit cd, Hoyalux GP Wide, Hoyalux GP, Hoyalux TACT,

Nulux ep. Proprietary lens materials: 1.70, Eyr, 1.67 Eynoa, 1.60 Eyas, 1.53 Phoenix, 1.50 Hilux and Nulux. Proprietary lens coatings: Super HiVision AR, HiVision AR, ViewProtect top coating, Suntech photochromics and Clarity Shield 2 scratch coating. Special Services/Programs include HHP (Hoya Honors Program).

www.hoyavision.com

ICARE LABS

Founded: 1968

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

No. of Locations: 1

No. of Employees: 115

Key Executives: Scott Payne, chairman; Skip Payne, president; James Payne, Bradley Husted, Greg Gehrig

Owners: The Payne family

Trade Names: Icare Labs, Sea Vision USA

Key Markets: East Coast, Southwest

2009 Est. Net Sales: \$21.5 million

Rx Sales: \$20.5 million

No. of Rx Jobs/Day: 2,150

Percentage of Uncut Jobs: 50%

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. Manufactures specialized sport prescription lens products including dive masks.

www.icare.com

KATZ & KLEIN

Founded: 1937

HQ./Main Lab Location: Sacramento, Calif.

No. of Locations: 1

No. of Employees: 40

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Top Labs Show Resilience Despite Tough Market

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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, 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

2009 Est. Net Sales: \$31.7 million

Rx Sales: \$30.7 million

No. of Rx Jobs/Day: 1,900

Percentage of Uncut Jobs: 56%

Comments: Offers wide range of exclusive promotions, customer incentive and educational programs. Field consultant force offers 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, 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, Crizal Alizé, Crizal Alizé with Clear Guard, Avance with Scotchgard Protector, TD2, Teflon, Zeiss Super and Gold ET, Advantage, Carat and Foundation XT and 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- & 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

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 Nyteyez 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

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

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

Percentage of Uncut Jobs: 30%

Comments: Operates in-house Crizal processing center. Distributes Varilux, Hoya and Shamir lenses. Special services and programs Crizal Performance Package.

www.opticalprescriptionlab.com

PERFECT OPTICS

Founded: 2006

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

No. of Locations: 1

No. of Employees: 58

Key Executives: Matt Schmidt-Wetekam, Thomas Brophy, Sabine Rentschar, Adam Winkelman, VSP, Carl Zeiss Vision

Owners: Warren Meyer, Matt Schmidt-Wetekam, Thomas Brophy, Sabine Rentschar, Adam Winkelman, director of sales and marketing; Tom Brophy, director of operations

Trade Names: Perfection FF Lens, Perfect Ion AR Coating

Key Markets: Calif., free-form nationwide

2009 Est. Net Sales: \$10.5 million

Rx Sales: \$10.5 million

No. of Rx Jobs/Day: 450

Percentage of Uncut Jobs: 30%

Comments: Specializes in free-form, digital surfacing. Proprietary products include Perfection FF lens, Perfect Ion AR coating. Offers Perfect Academy educational event.

www.perfectopticslab.com

PRECISION OPTICAL GROUP

Founded: 1992

HQ./Main Lab Location: Creston, Iowa

No. of Locations: 3

No. of Employees: 90

Key Executives: Deb Larson, Holly Ferber, Jan Ekeler, Judy Hodge, Lance Christensen, Nicki McDowell, Shannon Waigand, Mike Kellman

Owner: Mike Tamerius, Matt Somers

Trade Names: JMR Wholesale, K-Optical

Key Markets: National, Canada

2009 Est. Net Sales: \$14.5 million

Rx Sales: \$11.6 million

No. of Rx Jobs/Day: 1,300

Percentage of Uncut Jobs: 60%

Comments: Full-service, no frills lab, offering low pricing and same day service. Distributes semi-finished blanks and lab supplies to other wholesalers throughout the U.S. and Canada. Offers Crizal, Crizal Alize, Teflon and in-house clear AR coatings. Offers low cost, house brand progressives. VSP, VBA and VCP authorized. Extensive frame and lens package programs. Custom safety programs offered through ECPs. Online orders accepted via VisionWeb, Eyefinity and Precision Direct, plus traditional phone/fax service.

www.precisionopticalgroup.com

RELIABLE OPTICS

Founded: 2007

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

No. of Locations: 1

No. of Employees: 50

Key Executives: Howard S. Fried, OD; Edward Purman

Owner: Howard S. Fried, OD; Edward Purman, Lenny Berenzon, Michael Shur

Trade Names: none

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

2009 Est. Net Sales: \$4.8 million

Rx Sales: \$4.6 million

No. of Rx Jobs/Day: 650

Percentage of Uncut Jobs: 60%

Comments: Proprietary products include Crystal Allure and Crystal AR coating, both produced in-house. Special services include high-end edging and drill mounting.

www.reliableoptics.com

RITE-STYLE OPTICAL

Founded: 1948

HQ./Main Lab Location: Omaha, Neb.

No. of Locations: 1

No. of Employees: 105

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

Owner: Lee family

Trade Names: RSO Advante AR, Rite

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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 KodakCleAR 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.ritestyle.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, III

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%

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,

Zeiss, and Kodak AR. Distributes Zeiss, Signet Armorlite, Shamir, Vision Ease, Younger, Hoya, Seiko, Essilor and other major lens brands. On-site free-form technology and digital grinding. Offers most freeform 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 VCA and OLA. Offers online ordering and job tracking.

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 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

H.Q./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: Midwest

2009 Est. Net Sales: \$9.3 million

Rx Sales: \$8.7 million

No. of Rx Jobs/Day: 530

Percentage of Uncut Jobs: 10%

Comments: Dedicated sales force. Offers extensive training and education programs such as Jumpstart. Exclusive practice building initiatives such as Strata multimedia training series. Offers exclusive in-house Acclaro anti-reflective lens process, Armor XT premium scratch coating, 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, VSP's People First Lab Award Winner 2005, Transitions Heritage Ambassador Club Member 2008. 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: 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

Zeiss AR coatings. Offers 24-hour service.
www.usoptical.com

VSP OPTICAL LABORATORIES

Founded: 1972

HQ./Main Lab Location: Sacramento, Calif.

No. of Locations: 4

No. of Employees: 330

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; Danny Singer, director, Ultra Optics

Owner: Vision Service Plan

Trade Names: VSP Lab Sacramento, VSP Lab Columbus, Legends 4.0, Ultra Lens, Reveal and Inspire progressive lenses

Key Markets: National

2009 Est. Net Sales: \$72 million

Rx Sales: \$68.4 million

No. of Rx Jobs/Day: 5,000

Percentage of Uncut Jobs: 15%

Comments: Produces on-site AR, including Crizal, Teflon and proprietary Acuity Plus Platinum XP, Clearview Ultra and Ultra CleAR Luminous AR coatings. Special programs include VSP Lab Rewards program, Second Pair program. Operates on-site AR coating facilities producing Crizal and Teflon coatings. Distributes Varilux, Hoya, Transitions, Carl Zeiss Vision, Shamir, Seiko-Pentax, Signet Armorlite, Vision Ease and Younger products and proprietary Reveal and Inspire progressive lenses.

www.vsplab.com

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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 Pinacle, 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

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

1	Essilor	\$880.1
2	Hoya Vision Care Laboratories	174.2
3	Carl Zeiss Vision Laboratories	142.5
4	VSP Optical Laboratories*	68.4
5	Nassau Vision Group Laboratories	28.7

Source: Vision Monday
*Does not include contract labs

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

1	Essilor	64,500
2	Carl Zeiss Vision Laboratories	10,500
3	Hoya Vision Care Laboratories	10,400
4	VSP Optical Laboratories*	5,000
5	Nassau Vision Group Laboratories	3,000

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. ■■

Continued from page 49

WALMAN OPTICAL COMPANY**Founded:** 1915**HQ./Main Lab Location:** Minneapolis/St. Paul, Minn.**No. of Locations:** 32**No. of Employees:** 840

Key Executives: Marty Bassett president/CEO; Charles Pillsbury, executive VP; Doug Schlauderaff, executive VP; Craig Giles executive VP; John Anderson 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**2009 Est. Net Sales:** \$224 million**Rx Sales:** \$96 million**No. of Rx Jobs/Day:** 6,600**Percentage of Uncut Jobs:** 20%

Comments: Complete digital surfacing capabilities supported by on-site AR 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.

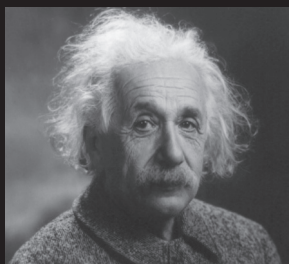
www.walman.com,www.loseyes.com**WINCHESTER OPTICAL****Founded:** 1902**HQ./Main Lab Location:** Elmira, N.Y.**No. of Locations:** 2**No. of Employees:** 80

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.**2009 Est. Net Sales:** \$11.0 million**Rx Sales:** \$10 million**No. of Rx Jobs/Day:** 735**Percentage of Uncut Jobs:** 23%

Comments: Proprietary products include GlareControl and GlareCutter lenses. Diversified lab with field sales force; manufactures RGP CLs; distributes soft contact lenses. Distributes frames. Offers practice management and office design consultation; sponsors biannual educational seminar for customers. ■■

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The Top 25 Independent Labs in 2009 At a Glance

	LAB	Net Sales	Rx Sales (% of Net)	Rx Sales*	Rxs Per Day	% of Uncuts	# of Employees	Year in Business
1	Walman Optical	224.0	43	96.0	6,600	20	840	95
2	Luzerne Optical	31.7	97	30.7	1,900	56	200	36
3	CSC Laboratories	28.5	90	25.2	1,650	30	165	41
4	ICare Labs	21.5	95	20.5	2,150	50	115	41
5	Three Rivers Optical	21.2	95	20.2	1,850	55	68	40
6	Rite-Style Optical	19.1	95	18.1	1,126	31	105	61
7	Expert Optical	19.0	90	17.1	930	20	92	30
8	Robertson Optical	16.1	95	15.3	1,400	26	102	52
9	MJ Optical	15.8	90	14.2	1,590	43	82	21
10	Diversified Ophthalmics Laboratory Group	30.6	43	13.2	1,005	20	101	32
11	Balester Optical	13.5	96	13.0	858	55	91	75
12	Classic Optical	12.5	99	12.4	1,900	10	90	39
13	Hirsch Optical	13.0	93	12.1	800	35	54	32
14	Precision Optical Group	14.5	80	11.6	1,300	60	90	17
15	Brothers' Optical Laboratory	11.5	100	11.5	550	23	59	36
16	FEA Industries	10.9	100	10.9	1,430	90	51	25
17	Perfect Optics	10.5	100	10.5	450	30	58	3
18	Winchester Optical	11.1	91	10.0	735	24	80	107
19	US Optical	9.8	100	9.8	710	60	35	1
20	Toledo Optical	9.3	94	530	10	55	55	62
21	Harbor Optical	6.7	94	6.3	390	12	43	12
22	Cherry Optical	6.0	98	5.9	325	20	28	10
23	Katz & Klein	6.0	95	5.7	401	18	40	72
24	Optical Precision Lab	5.3	92	4.9	315	30	25	32
25	Reliable Optics	4.8	95	4.6	650	60	50	2

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