

What It Takes to Be a Top Lab

VM's annual report analyzes the biggest wholesalers and what sets them apart

TOP
LABS
VM2013



BY ANDREW KARP / GROUP EDITOR, LENSES + TECHNOLOGY

NEW YORK—What does it take to be a *Vision Monday* Top Lab? The requirements have changed a lot in recent years, as the wholesale laboratory business itself has evolved.

Wholesalers today are facing a very different “labscape” than they did in 1992, when *VM* published its first annual Top Labs Report, which ranks the largest U.S. labs based on their Rx sales and includes exclusive data about production levels, number of locations, work force size and other key indicators. Widespread industry consolidation, the growth of managed vision care and the emergence of the Internet and technologies such as digital lens surfacing have created new forms of competition and changed customer expectations.

At a minimum, a large and successful lab must offer a diverse selection of major lens brands, excellent quality workmanship, superior service and competitive prices. But *VM*'s 2013 Top Labs go beyond these basics.

As the new Top Labs Report shows, today's leading wholesalers are equipped with the latest digital lens surfacing technologies. They produce a variety of digital lens designs from top suppliers in different materials as well as a selection of private label designs. A Top Lab typically uses industrial finishing technology to improve production efficiency and

edge sun lenses with high base curves for wraparound eyewear. They also operate in-house anti-reflective coating centers to produce both name brand and private label coatings. To link all this technology together, track inventory levels and place restocking orders with vendors, Top Labs use sophisticated lab management systems.

Although it's crucial for a Top Lab to stay on the cutting edge of lens processing technology, it's just as important for it to be easily accessible to customers. Consequently, most Top Labs have developed full-featured websites with online ordering capability and educational resources. Having a knowledgeable customer service team is also essential to a Top Lab's success, as is the ability to educate eyecare professionals and office staff.

As this year's Top Labs Report indicates, nearly all the leading wholesalers share these and other key characteristics, whether they are independent or owned by a supplier.

Top Lab Performance: 2013 Versus 2012

Business has been strong for the past 12 months for the Top Labs, with all the leading indicators showing an increase over last year.

The combined net sales for all of the Top Labs, including both Supplier-Owned Lab Networks and

Independent Labs, reached \$2,341.8 million in 2013, up 2.7 percent from 2012.

The total aggregate Rx sales, which is based on the Top Labs' core business of surfacing and finishing prescription lenses and is the primary measure used to rank them, reached \$2,092.3 million collectively, up 7.4 percent over 2012. The Top Labs collectively produced a total of 134,678 Rx jobs per day, or approximately 33.7 million Rx jobs annually, a 1.8 percent increase over last year.

Top 5 Supplier-Owned Networks

The past 12 months were productive for the Top 5 Supplier-Owned U.S. Wholesale Lab Networks. Collectively, the Top 5 generated \$1,767 million in total net sales, up 3.2 percent over 2012. Total Rx sales totaled \$1,670.1, an 8.3 percent increase over 2012. Rx lens sales comprised 94.8 percent of Total Net Sales for the Top 5 Labs, up 3 percent over 2012.

The number of Rx jobs per day for the Top 5 rose to 107,100, up 3.9 percent from a year ago. The average proportion of uncut lens jobs among the Top 5 is 33.4 percent, a 4.8 percent decrease from 2012.

The Top 5 currently operate 189 individual lab locations, three less than last year. The Top 5 work force grew 2.7 percent from 2012, to 9,674 employees.

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VM's Top Labs Performance Analysis

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

	2013 (\$millions)	2012 (\$millions)	% change
Total Net Sales	\$1,767.0	\$1,710.0	+3.2%
Total Rx Sales	\$1,670.6	\$1,532.1	+8.3%
Avg. Rx Sales as Percentage of Total Net Sales	94.8%	92.0%	+3.0%
Total Rx Jobs Per Day	107,100	102,900	+3.9%
Avg. Percent of Uncuts	33.4%	35.0%	-4.8%
Total Number of Lab Locations	189	192	-1.6%
Total Number of Employees	9,674	9,414	+2.7%

VM's Top 20 Independent U.S. Wholesale Labs

	2013 (\$millions)	2012 (\$millions)	% change
Total Net Sales	\$574.8	\$569.3	+1.0%
Total Rx Sales	\$421.7	\$404.9	+4.0%
Avg. Rx Sales as Percentage of Total Net Sales	88.4%**	83.6%*	+5.4%
Total Rx Jobs Per Day	27,578	29,407	-6.6%
Avg. Percent of Uncuts	40.4%	38.0%	+5.9%
Total Number of Lab Locations	76	70	+7.9%
Total Number of Employees	2,482	2,427	+2.2%

Rx Sales represent the majority of revenue for most of the Top Labs. However, the following are exceptions, and therefore were not included in calculating the Average Rx Sales as a Percent of Total Net Sales:

*Does not include Walman Optical, which had Rx sales of 46 percent and Diversified Ophthalmics, which had Rx sales of 48 percent.

**Does not include Diversified Ophthalmics, which had Rx sales of 48 percent.

Source: Vision Monday estimates

Surveying the Changing 'Landscape'

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The Top 5 Labs that made the biggest gains in 2013 were Essilor Laboratories of America, the largest Supplier-Owned Lab Network, which generated \$1,128 million in Rx sales this year, an increase of \$70 million, or 6.2 percent over 2012; VSPOne Optical Technology Centers, which moved from the number four spot in 2012 to the number three spot this year, posted \$155.1 million in Rx sales, an increase of \$42.3 million, or 27.3 percent from year-ago; and Hoya Laboratories of America, the second largest Supplier-Owned Lab Network, generated \$218.5 million in Rx sales, up \$24.5 million, or 11.4 percent over 2012.

The Top 20 Independents

The total aggregate net sales for the Top 20 Independents in 2013 is \$574.8 million, up 1 percent

over 2012. Total aggregate Rx sales for the Top 20 rose 4.0 percent to \$421.7 million.

Rx sales accounted for 88.4 percent of net sales for the Top 20, a 5.4 percent increase over 2012. Unit sales among the Top 20 shrank by 6.6 percent, to 27,578 jobs per day in 2013. Although the decrease in productivity contrasts with the increase in Rx sales, it may reflect the fact that some Top 25 Independents have installed digital surfacing and finishing technology in the past 12 months, thus enabling them to produce a greater percentage of high-value, high margin Rx jobs. Uncut lenses, on average, accounted for 40.4 percent of Rx jobs produced by the Top 20, up 5.9 percent over 2012.

The total number of lab locations operated by the Top 20 increased from 70 in 2012 to 76 in 2013. The size of the Top 20 labs' work force grew to 2,482 employees, a 2.2 percent increase over 2013.

The most significant gains among the Top 20 were achieved by top ranked Walman Optical, whose growth was both organic and the result of acquisitions. The Minneapolis-based wholesaler boosted its Rx sales to \$160 million in 2013, an increase of \$49 million from 2012, or 30.6 percent.

Among the other fast growing Independents were US Optical, which moved from the number four spot in 2012 to the number three spot this year, posting Rx sales of \$26 million, an increase of \$4 million, or 15.4 percent and Digital Eye Lab, which moved from the number five spot to number four, generating Rx sales of \$24.2 million, an increase of \$4 million, or 16.5 percent. Rx sales account for 100 percent of the revenue for both of these labs, which are focused on producing digital lenses. Both are located in New York, and have been in business less than seven years, making them among the newest labs in the Top 20. ■

More →



Vision Monday's TOP LABS – 2013

(IN ALPHABETICAL ORDER)

Brothers' Optical Laboratory

Founded: 1973

HQ./Main Lab Location: Orange, Calif.

No. of Locations: 1

No. of Employees: 59

Key Executives: Carlo Ragazzo, Tony Esposito

Owners: Joseph M. Ragazzo, John Ragazzo

Trade Names: None

Key Markets: Calif., Ariz., Las Vegas, Ore., Hawaii

2013 Est. Net Sales: \$10 million

Rx Sales: \$10.0 million

No. of Rx Jobs/Day: 400

Percentage of Uncut Jobs: 25%

Comments: Well-established West Coast lab; VSP-authorized. Offers online order entry, order status check capability and work in process nightly reports.

Access to all lens vendors. In-house AR coating.

www.brothersoptical.com

Carl Zeiss Vision Laboratories

Founded: 2000

HQ.: San Diego, Calif.

No. of Locations: 16

No. of Employees: 1,000

Key Executives: Joe Donahoe, president, North America; Claude Labeeuw, vice president, marketing; Steve Ballenger, vice president, operations; Steve Mitrakos, senior vice president, sales

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

2013 Est. Net Sales: \$162 million

Rx Sales: \$146 million

No. of Rx Jobs/Day: 10,600

Percentage of Uncut Jobs: 25%

Comments: Proprietary products include Zeiss brand lenses and coatings, PhotoFusion by Zeiss; SOLA and AO lenses, Teflon Clear Coat Lenses. Offers Zeiss Practice Advantage program.

www.zeiss.com/lenses

Cherry Optical

Founded: 1999

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

No. of Locations: 1

No. of Employees: 36

Key Executives: Adam Cherry, Lynn Cherry, Joe Cherry

Owners: Adam Cherry, Lynn Cherry, Joe Cherry

Trade Names: Independence, Independence HD, Quantum 2, Quantum 2 HD, Cherry Approved AR, Safety Optix, What's New University, What's New monthly newsletter.

Key Markets: Worldwide

2013 Est. Net Sales: \$8.1 million

Rx Sales: \$7.7 million

No. of Rx Jobs/Day: 350

Percentage of Uncut Jobs: 20%

Comments: Offers 24/5 manufacturing; annual What's New University CE event at Lambeau Field. Highly skilled MEI lens milling specialists allow Cherry Optical to easily process advanced warp and sports frames. Cherry Optical's What's New monthly newsletter provides unbiased news and

reviews of the latest optical products, services, industry news and trends.

www.facebook.com/thecherryopticalinc

Digital Eye Lab (a division of ABB Optical Group)

Founded: 2007

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

Number of Locations: 1

No. of Employees: 80

Key Executives: Scott Pearl, managing director; Vince Monaghan, VP of manufacturing

Owner: ABB Optical Group

Trade Names: None

Key Markets: National

Est. Net Sales 2013: \$24.2 million

Rx Sales: \$24.2 million

No. of Rx Jobs/Day: 1,050

Percentage of Uncut Jobs: 52%

Comments: 100 percent of lenses are digitally surfaced using proprietary DXT manufacturing platform. Multiple fully automated digital fabrication lines. On-site Claris HD AR coating center. Extensive on-site lens finishing center, featuring interchangeable and wrap lens finishing capability. National sales organization. "Digital Rewards" customer loyalty program. Website features proprietary online job ordering/tracking/reporting functions built specifically for the unique needs of digital lenses. Overnight delivery across the continental U.S. on a unique mix of digital lenses from Digital 5.0, Seiko, Indo and Shamir. Continually developing next generation lens options. Proprietary products include Digital 5.0 Personalized Lens Series, Digital Master Series, Curve PAL and SV wrap designs, Claris HD AR coating.

www.Digitaleylab.com

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Diversified Ophthalmics Laboratory Group

Founded: 1977

HQ./Main Lab Location: Cincinnati, Ohio

No. of Locations: 11

No. of Employees: 98

Key Executives: Ronald Cooke, president/CEO; Daniel Woebkenberg, VP sales and marketing; Keith Ansley, VP, operations

Owner: Closely held corporation

Trade Names: PureSite Lenses, PureSite Digital, PureSite Preference AR, Practice Maximus

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

2013 Est. Net Sales: \$30.6 million

Rx Sales: \$14.7 million

No. of Rx Jobs/Day: 1,080

Percentage of Uncut Jobs: 22%

Comments: Ophthalmic lens and RGP manufacturing capabilities. 2012 and 2005 Transitions "Lab of the Year." Transitions Platinum Elite Laboratory. Transitions Heritage Lab. Authorized Varilux distributor. VSP contract lab. Sig-net Armorlite partner lab. Operates on-site AR coating facility. AR branded products includes PureSite Preference Platinum. Offers free-form digital surfacing, including PureSite Digital lenses, Essilor lenses, Kodak lenses and Shamir lenses. Offers eyeglass and contact lens packages, Perfect View frame-and-lens value packages, certified continuing education seminars and staff training. Markets PureSite brand of stock lenses. On-line and electronic ordering. Remote frame tracing. Member of the Vision Council, Vision Council Lab Division and AR Council. 2006, 2007, 2008 and 2010 LabTalk Top Ten Web Site of the Year. 2009 LabTalk Top Web Site.

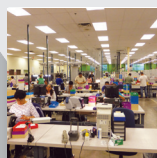
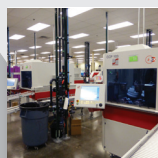
www.divopt.com

The Top 20 Independent Labs in 2013 at a Glance

Lab	Net Sales	Rx Sales (% of Net)	Rx Sales	Rxs Per Day	% of Uncuts	# of Employees	Years in Business
1. Walman Optical	275.0	58	160.0	8,000	20	1,000	98
2. Luzerne Optical	34.0	97	33.0	2,050	46	200	40
3. US Optical	26.0	100	26.0	1,600	65	90	5
4. Digital Eye Lab	24.2	100	24.2	1,050	52	80	6
5. Expert Optics	21.6	95	20.5	915	24	90	34
6. Icare Labs	19.6	95	18.6	1,550	65	95	45
7. Three Rivers Optical	18.8	96	18.0	1,525	45	68	44
8. Robertson Optical	18.4	96	17.7	1,500	20	111	55
9. Diversified Ophthalmics Laboratory Group	30.6	48	14.7	1,125	24	98	36
10. FEA Industries	14.2	98	13.9	1,730	90	84	29
11. Precision Optical Group	18.5	70	12.6	1,600	70	85	21
12. Brothers' Optical Laboratory	10.0	100	10.0	400	25	59	40
13. MJ Optical	12.9	76	9.8	1,250	59	54	25
14. Vision Associates of Rochester	11.0	86	9.5	800	15	115	12
15. Cherry Optical	8.1	95	7.7	350	20	36	12
16. Optical Prescription Lab	6.2	90	5.6	375	30	23	36
17. Superior Optical Labs	5.5	99	5.4	375	5	47	22
18. Vision Dynamics Laboratory	9.2	57	5.2	600	30	70	6
19. Eye Kraft Optical	6.1	77	4.7	448	2	48	59
20. Laramy-K Optical	4.9	95	4.6	335	100	29	24

Rankings are based on Rx sales. Sales estimates reflect combined sources of business for calendar year 2013 and are calculated 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 sales are ranked alphabetically.

Source: Vision Monday



Essilor Laboratories of America

Founded: 1996

HQ./Main Lab Location: Dallas, Texas

No. of Locations: 134

No. of Employees: 6,529

Key Executives: Real Goulet, president Essilor Lab Group; Mike McCollum, senior vice president ELOA Labs; Mike Nathe, senior vice president, Partner Labs; Alain Mathieu, vice president operations and technologies; Paul Owston, vice president lab network sales

Owner: Essilor International

Trade Names: 21st Century Optical, ABBA Contact Lens, AccuRX Inc., Advance Optical, Apex, Aspen Optical, Balester, Barnett & Ramel, Bartley Optical, Beidler-McKee Optical, Bell Optical Labs, Bristow Optical, Central 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 New Jersey, Empire Optical, Epic Labs, Eyecare Express, Focus Optical, Future Optical FL, Future Optical TN, GK Optical, Gold Optical, Gulf States Optical, Heard Optical, Hi-Tech, Homer Optical, Jorgenson Optical, Interstate Optical, Kosh Ophthalmic, LensTech, Meridian Optical, McLeod Optical, MGM Optical, Midland Optical, Milroy, NEA Optical, New City Optical, Omega Optical, Omni Optical Lab, Optical One, Inc, Optic Blue, Optical Suppliers Inc., Optical Supply, Opti-Craft, Optimatrix, Optogenics of Syracuse, Ozarks Optical, Pech Optical, Perferx Optical, Peninsula Optical, Personal Eyes Optical, Precision Optical Company, Precision Optics, Premier Optics, Professional Ophthalmic Labs, Reliable Optics, S&G Optical, Select Optical, Southern Optical, Southwest Lens, Spectrum Optical, Sunstar Optical, Sutherlin Optical, Tri-Supreme, Truckee Meadows, Twin City Optical, Vision Craft Inc, Winchester, WOS Optical

Key Markets: Local and National

2013 Est. Net Sales: \$1,187 million

Rx Sales: \$1,128 million

No. of Rx Jobs/Day: 74,000

Percentage of Uncut Jobs: 32%

Comments: Proprietary products include LiteStyle/Ultra LiteStyle Lenses, Varilux, Crizal UV AR Coatings, Sharpview. Xperio UV. Programs include ECP University, Needs Based Solutions, Think About Your Practice, Doctor Directed Process.

www.eloa.com

Expert Optics

Founded: 1979

HQ./Main Lab Location: Shorewood, Ill.

No. of Locations: 2

No. of Employees: 90

Key Executives: Don Ruden, CEO; Greg Ruden, president; Bob Pommier, director of laboratory operations; Dennis Geuder, director of sales; Bob Hughbanks, manager of training and education

Owner: Greg Ruden

Trade names: Expert Best, Expert Essential, Expert Elite, Expert Extreme

Key Markets: National

2013 Est. Net Sales: \$21.6 million

Rx Sales: \$20.5 million

No. of Rx Jobs/Day: 915

Percentage of Uncut Jobs: 24%

Comments: Full service independent lab and wholesale distributor. Operates three free-form production lines that process numerous lens designs from the leading manufacturers including: AO Easy HD, Compact Ultra HD, Seiko Succeed, Seiko Supercede, Seiko Surmount, Shamir Attitude, Shamir Autograph, Shamir Element, Shamir Office, SOLA HDV, SOLA One HD, Varilux Comfort DRx, Varilux Physio DRx, Zeiss GT2 3D, Zeiss GT2 3DV, Zeiss Individual. The complete Crizal anti-reflective coating line anchors a 6,000 square foot Coating facility which includes three coaters capable of processing all the AR coating brands from SOLA,

Zeiss, and Essilor. Distributes Kodak, Shamir, Varilux and Zeiss progressive lenses. Signet Armorlite Partner Lab, Carl Zeiss Vision Premier Lab and member of Global Optics. Teflon Clear Coat, Crizal and Kodak Clear coating facility in-house; also producers of Zeiss foundation XT, Carat and Carat Advantage lens treatments, Chemie Magnetic Clip, Oasis Tears and Enhancer Lens Treatment. Hosts annual Optical Preview Day. ABO-certified sales force offers in-office education. Offers Lenstock web-based lens ordering and inventory management system. Distributor sales department inventories over 50 frame lines with various frame and lens package programs. Authorized lens processor of emPower electronic eyewear by Pixel Optics and Carrera X-cede polarized NXT by Safilo. Exclusive distributor and processor of VedaloHD sunwear featuring the patented HDL-3C lens technology.

www.expertoptycs.net

Eye Kraft Optical

Founded: 1954

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

No. of Locations: 1

No. of Employees: 48

Key Executives: Floyd Lehne, president; Lawrence Lahr, VP; Michael Moeller, treasurer

Owner: Patricia Negaard

Trade Names: Eye-Lite, Eye-Lite Poly, Sun-Lite

Key Markets: National

2013 Est. Net Sales: \$6.1 million

Rx Sales: \$4.7 million

No. of Rx Jobs/Day: 448

Percentage of Uncut Jobs: 2%

Comments: Full service, VBA-approved lab. Provides free point-of-purchase brochures and counter displays to help educate patients. Offers lens and frame package including 130 stocked, high quality frame styles from nine

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VM's Top 20 Independent Wholesale Labs by 2013 Rx Sales

(\$ millions)

1.	Walman Optical	160.0
2.	Luzerne Optical	33.0
3.	US Optical	26.0
4.	Digital Eye Lab	24.2
5.	Expert Optics	20.5
6.	Icare Labs	18.6
7.	Three Rivers Optical	18.0
8.	Robertson Optical	17.7
9.	Diversified Ophthalmics	14.7
10.	FEA Industries	13.9
11.	Precision Optical Group	12.6
12.	Brothers' Optical	10.0
13.	MJ Optical	9.8
14.	Vision Associates of Rochester	9.5
15.	Cherry Optical	7.7
16.	Optical Prescription Lab	5.6
17.	Superior Optical Labs	5.4
18.	Vision Dynamics Laboratory	5.2
19.	Eye Kraft Optical	4.7
20.	Laramy-K Optical	4.6

Rx sales estimates for calendar year 2013 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 20 Independent Wholesale Labs by 2013 Rx Jobs Per Day

1.	Walman Optical	8,000
2.	Luzerne Optical	2,050
3.	FEA Industries	1,730
4.	Precision Optical Group	1,600
5.	US Optical	1,600
6.	Icare Industries	1,550
7.	Three Rivers Optical	1,525
8.	Robertson Optical	1,500
9.	MJ Optical	1,250
10.	Diversified Ophthalmics	1,125
11.	Digital Eye Lab	1,050
12.	Expert Optics	915
13.	Vision Associates of Rochester	800
14.	Vision Dynamics Laboratory	600
15.	Eye Kraft Optical	448
16.	Brothers' Optical Laboratory	400
17.	Optical Prescription Lab	375
18.	Superior Optical Labs	375
19.	Cherry Optical	350
20.	Laramy-K Optical	335

Rx jobs per day estimates were calculated based on a number of sources, which may include interviews with company management, financial disclosure documents and information from knowledgeable secondary sources. Companies with the same number of jobs per day are ranked alphabetically.

Source: Vision Monday

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manufacturers with various lens types. Accepts many forms of insurance, including MN Care. Affiliated with ophthalmic buying groups including The Alliance/Buyers Edge, America's Doctors of Optometry, Association of Eye Care, Centers/Pearlman Buying Group, Block Vision Buying Group, C&E Vision Services, Hayes Marketing, Newton Professional Purchasing, Ophthalmic Education Institute, Wisconsin Vision Associates. Offers same-day service at no extra charge. Offers various AR coatings including Crizal and Crizal Alizé.

www.eyekraft.com

FEA Industries

Founded: 1984

HQ./Main Lab Location: Morton, Pa.

No. of Locations: 1

No. of Employees: 84

Key Executives: Chrystal Colflesh, general manager; Chris Heeney, operations manager; William H. Heffner, IV, IT and marketing

Owner: William H. Heffner, III

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

Key Markets: National

2013 Est. Net Sales: \$14.2 million

Rx Sales: \$13.9 million

No. of Rx Jobs/Day: 1,730

Percentage of Uncut Jobs: 90%

Comments: Five free-form production lines. On-site software development. Glass free-form lenses will be available December, 2013. Website includes ordering, tracking reports, invoices. Participates in third-party program VBA only. Offers stock lenses, stock frames and safety frames. Handles most lens brands except Varilux. Independent AR offers lifetime warranty.

www.feaind.com

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Hoya Optical Laboratories America

Founded: 1998

HQ./Main Lab Location: Lewisville, Texas

No. of Locations: 28

No. of Employees: 1,240

Key Executives: Barney Dougher, president; Gregg Fowler, senior vice president sales and marketing; Jason White vice president finance; Mike Dougher, senior vice president manufacturing & operations; Greg Hicks OD, director of professional affairs; Ann Marie Lahr, OD, director of education

Owner: Hoya Corporation

Trade Names: Hoya Michigan, Hoya Lewiston, Hoya Largo, Hoya Las Vegas, Hoya Los Angeles, Hoya Knoxville, Hoya Atlanta, Hoya Boise, Hoya Dallas, Hoya Cleveland, Hoya Birmingham, Hoya Chicago, Hoya Dayton, Hoya Greenville, Hoya Des Moines, Hoya Denver, Hoya Hartford, Hoya Eugene, Hoya Modesto, Hoya Portland, Hoya New Orleans, Hoya San Antonio, Hoya Salina, Hoya St. Louis, Hoya San Jose, Hoya San Diego, Hoya Seattle

Key Markets: National

2013 Est. Net Sales: \$230 million

Rx Sales: \$218.5 million

No. of Rx Jobs/Day: 12,500

Percentage of Uncut Jobs: 15%

Comments: Proprietary free-form progressive and single vision lens designs include iD MyStyle, iD InStyle, iD LifeStyle, Hoyalux Array, iD Single Vision, Summit ecp and cd iQ, ST28 iQ, SV iQ, Distortion Free Optics, Sync, Summit ecp and cd, and TACT. Proprietary lens materials include 1.70, Eyry, 1.67 Eynoa, 1.60 Eyas, 1.53 Phoenix, 1.50. Proprietary lens treatments include Super HiVision EX3, Super HiVision, Recharge and HiVision. Special products, services and programs include Spectangle custom measuring device, Eye Connect, Dedicated Customer Service Departments at each Hoya Lab,

Hoya Honors Program, Dedicated Sales Force, Frame and Lens Packages, Safety Frame Package, PNX Kids Package, Super Kidz Program, Optical School and Lens Design Education, in-office lunch and learn, and custom business management programs.

Hoya Vision Care produces the iD Series of Personalized Lenses, the iQ Series of Optimized Lenses, HOYA DF Distortion Free Optics, Sync, and Super HiVision Series of AR Treatments.

www.hoyavision.com; www.thehoyafreeformcompany.com; www.choosemylens.com

Icare Labs

Founded: 1968

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

No. of Locations: 1

No. of Employees: 95

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

Owners: The Payne Family

Trade Names: Icare Labs, ICL365, Sea Vision USA

Key Markets: National

2013 Est. Net Sales: \$19.6 million

Rx Sales: \$18.6 million

No. of Rx Jobs/Day: 1,550

Percentage of Uncut Jobs: 65%

Comments: Family owned and operated. Offers all major lens brands such as Varilux, Kodak, Zeiss and Hoya. Operates in-house Crizal AR coating center. Offers own ICE AR brand. In-house digital lab produces Essilor, Varilux, Shamir and own Legacy series. Proprietary brands include ICE AR, Legacy digital lenses. Authorized distributor of all major lens brands. Manufactures specialized sport prescription lens products including SeaVision dive masks. Fully automated digital production line along with robotic edging.

www.icarelabs.com; www.icl365.com

Laramy-K Optical

Founded: 1989

HQ./Main Lab Location: Indianola, Iowa

No. of Locations: 1

No. of Employees: 29

Key Executives: John Larson, general manager

Owners: Janet Benjamin, Keith Benjamin, John Larson

Trade Names: LKO

Key Markets: Worldwide

2013 Est. Net Sales: \$4.9 million

Rx Sales: \$4.6 million

No. of Rx Jobs/Day: 335

Percentage of Uncut Jobs: 100 percent

Comments: On-site free-form surfacing and AR. Free-form verification with A&R Optical Machinery's Dual Lens Mapper. Produces Integrity series lenses and coatings encompassing 10 distinctive free-form designs to fit every need. Available with lenticularization, digital slabs and high powers. Three ultra-premium AR coatings: blue residual, clear Ar and UVARity, which addresses reflected UV and HEV light, all topped with a power coat for easy in-office processing. Open Optix online education offering ABO and NCL study guides with practice tests along with many other education topics. Online store for optical tools and consumables. "My Patient is Waiting" program for instant information about product availability and application.

www.laramyk.com

Luzerne Optical Laboratories

Founded: 1973

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

No. of Locations: 1

No. of Employees: 200

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Top Labs That Made News in 2013

NEW YORK—Many of Vision Monday's Top Labs made news in the past 12 months, either by expanding operations, being involved in mergers and acquisitions or entering into significant new partnerships. Here is a chronology of the key events between September, 2012 and September, 2013 in which the Top Labs played a role, as reported in *VM* and *VMail*.

September, 2012

Hoya Vision Care, the second largest Supplier-Owned U.S. Lab Network, announced that it recently opened a lab in Clive, Iowa, near Des Moines. Hoya said the new facility is equipped for processing its free-form lenses and its SuperHiVision AR lenses.

October, 2012

Essilor, the largest Supplier-Owned U.S. Lab Network, announced that it had made three important acquisitions, including two Top Labs: Balester Optical in Wilkes-Barre, Pa., and Hirsch Optical in Farmingdale, N.Y. Balester Optical was ranked as the 12th largest Independent U.S. Wholesale Lab in Vision Monday's 2012 Top Labs Report. The lab has been controlled by the Balester family since it was founded in 1934.

Hirsch Optical had been owned by Roz Rothstein, Michael Rothstein and Ken Mittel. The lab, which was founded in 1978, ranked 14th among VM's Top 25 Independent Wholesale Labs in 2012.

The third lab Essilor acquired was Carskadden Optical Company, a 66-year-old Zanesville, Ohio wholesale lab. The transaction was done through Select Optical, an Essilor lab based in Columbus, Ohio.

January

Walman Optical Co., the largest Independent Wholesale Lab Network, purchased Rite-Style

Optical (RSO) in Omaha, Neb. Walman bought the 65-year-old company from its founder, George Lee, and the Lee family. RSO was ranked third among Vision Monday's 2012 Top Labs.

Also in January, the two leading contact lens distributors in the U.S., ABB Concise and Optical Distributor Group (ODG) announced that they had merged. The merger included ODG's Digital Eye Lab, the fifth-ranked independent wholesale lab in 2012, according to the VM's Top Labs Report.

Finally, Essilor announced that it had acquired LensTech Optical, a wholesale laboratory in Greenwood, Ind.



June

Essilor announced that it had acquired a majority interest in Prodigy Optical, a Minnesota lab and e.magine Optical, a Tulsa, Okla. lab that ranked 25th among VM's Top U.S. Wholesale Labs in 2012.

EyeMed Vision Care announced that it is implementing an updated business model designed to support provider practice growth, simplify administration and deliver a wide choice of products and labs. The model includes a range of new features designed to support provider practice growth, simplify administration and deliver extensive lab and product choice, including a national lab network featuring Essilor Laborato-

ries of America.

Specific Essilor Partner Labs and the Walman Optical Co. family of businesses, including Walman, Soderberg, Harbor and Rite-Style, will be added by October 2013, EyeMed said. Participating providers will register for labs from among the 60 offered in EyeMed's new national network, which includes Luxottica Lab Services. By the end of 2013, the lab network is expected to grow to more than 100 through the inclusion of specific Essilor Partner labs and the Walman labs.

July

VSP Optics Group, the third-ranked Supplier-Owned U.S. lab network, reported that it would open two new VSPOne Optical Technology Centers this summer, one in St. Cloud, Minn., and the other in Hawaii. The Minnesota and Hawaii facilities expand the VSPOne Optical Technology Center network to a total of nine locations.

Essilor purchased a majority interest in Classic Optical Laboratories, a Youngstown, Ohio wholesale laboratory specializing in managing high-volume contracts for insurance organizations, managed care organizations, union organizations and trust funds, educational institutions, correctional facilities, manufacturing plants, and federal and state government programs. The Friedkin family, including company president Dawn Friedkin, retains a minority interest in Classic Optical. The lab will remain as "an individual entity" and the company's management team, headed by Friedkin, will remain in place, according to Essilor.

Classic Optical was founded in 1970. The company, which employs 170 people and produces more than 3,000 pairs of prescription lenses, will generate net sales of \$20 million in 2013, according to *Vision Monday* estimates. It was ranked 10th among independent U.S. wholesale laboratories in VM's 2012 Top Labs Report. ■

akarp@jobson.com



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VM's Top 5 Supplier-Owned U.S. Lab Networks 2013 Rx Sales

(\$ millions)

1.	Essilor Laboratories of America	\$1,128.0
2.	Hoya Optical Laboratories of America	\$218.5
3.	VSPOne Optical Technology Centers	\$155.1
4.	Carl Zeiss Vision Laboratories	\$146.0
5.	Nova Optical Lab	\$23.0

Source: Vision Monday

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

Owner: Dougherty Family

Trade Names: Polar365, SightStar, PhotoFashion, DuraCurve, Crizal Easy UV, Crizal Alizé UV, Crizal Avancé UV, Crizal Sunshield UV, Crizal UV with Optifog, TD2, Teflon, Advantage, Carat and Foundation XT, EVC-enhanced visual clarity, Zeiss PureCoat, Teflon Elite, Zeiss Allure.

Key Markets: National

2013 Est. Net Sales: \$34 million

Rx Sales: \$33 million

No. of Rx Jobs/Day: 2,050

Percentage of Uncut Jobs: 46%

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. Offers digital iPad-based iFit dispensing system. Authorized empower! Life-Activated Eyewear Laboratory. Manufactures SightStar, Polar365, PhotoFashion, Varilux, Zeiss, Definity, Transitions, Essilor, Shamir, Kodak, Hoya, Poly-

VM's Top 5 Supplier-Owned U.S. Lab Networks 2013 Rx Jobs Per Day

1.	Essilor Laboratories of America	74,000
2.	Hoya Optical Laboratories of America	12,500
3.	Carl Zeiss Vision Laboratories	10,600
4.	VSPOne Optical Technology Centers	8,500
5.	Nova Optical Lab	1,500

Source: Vision Monday

core, Optima, Pixel Optics, Kaenon, Seiko, Vision-Ease, Marinelli, DriveWear premium lenses and difficult Rx's. Offers frames, frame/lens package programs, Chemie 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 Sunshield UV, Crizal UV with Optifog, TD2, Zeiss PureCoat, Teflon Elite, Teflon, Zeiss Allure, Zeiss Super & Gold ET, Advantage, Carat, Foundation XT and Mirror coatings. Award -winning in-house gas perm contact lens facility produces custom DuraCurve aspheric GP's. Offers complex wrap Rx sunglass finishing services. Provides advanced remote ordering with RxWizard, Visionweb, Paradeyes and Eyefinity software via the web. Vendor lab for most major buying groups. VSP & VBA approved lab.

www.luzerneoptical.com

MJ Optical

Founded: 1988

HQ./Main Lab Location: Omaha, Neb.

No. of Locations: 1

No. of Employees: 54

Key Executives: Matt Hagge, Mike Hagge, David Mize, Parke Wilkinson, Marty Hagge, Mitch Hagge, Morrie Hagge

Owner: Mary Hagge

Trade Names: None

Key Markets: National

2013 Est. Net Sales: \$12.9 million

Rx Sales: \$9.8 million

No. of Rx Jobs/Day: 1,250

Percentage of Uncut Jobs: 59%

Comments: Proprietary products include MJ FP program; Titanium frame program. In-house AR, computerized drill mount, digital lens (Platinum HD, SV HD). Varilux distributor; Varilux digital. Distributes contact lenses.

www.mjoptical.com

Nova Optical Lab

Founded: 1996

HQ.: Northvale, N.J.

Main Lab Location: Orangeburg, N.Y.

No. of Locations: 2

No. of Employees: 105

Key Executives: Maureen Cavanagh, president, Nassau Vision Group; Neil Rosen, vice president sales operations/marketing/IT; Bruno Barajuan, general manager

Owner: Essilor of America

Trade Names: Nassau Vision Group, Nova Optical, Nassau Lens Florida, Nassau Lens Southwest, Nassau Lens Midwest, Nassau Lens Southeast, Nassau Lens West

Key Markets: National

2013 Est. Net Sales: \$23 million

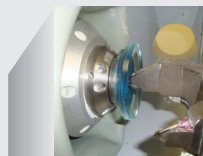
Rx Sales: \$23 million

No. of Rx Jobs/Day: 1,500

Percentage of Uncut Jobs: 80%

Comments: Proprietary products include in-house AR (Triumph, Synergy Chrystal), Shoreview digital

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lenses. Services and programs include surfacing, coating, finishing, customer service. Offers traditional and digital products.

www.nassau247.com; www.novaopticallab.com

Optical Prescription Lab

Founded: 1977

HQ./Main Lab Location: Pelham, Ala.

No. of Locations: 1

No. of Employees: 23

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

Owners: Danny Pugh, Sherry Pugh

Trade Names: OPL

Key Markets: Ala., Tenn., Miss., Ga., Fla., Ky., La., S.C., N.C., Va.

2013 Est. Net Sales: \$6.2 million

Rx Sales: \$5.6 million

No. of Rx Jobs/Day: 375

Percentage of Uncut Jobs: 30%

Comments: Offers in-house digital lens processing; distributes Varilux, Crizal, Shamir and Transitions lenses. Operates in-house Crizal processing center. VSP, VCP and VBA-approved lab.

www.opticalprescriptionlab.com

Precision Optical Group

Founded: 1992

HQ./Main Lab Location: Creston, Iowa

No. of Locations: 3

No. of Employees: 85

Key Executives: Shannon Waigand, Lance Christensen, Judy Hodge, Mike Kellman, Warren Herron

Owner: Mike Tamerius, Matt Somers

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

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

2013 Est. Net Sales: \$18.5 million

Rx Sales: \$12.6 million

No. of Rx Jobs/Day: 1,600

Percentage of Uncut Jobs: 70%

Comments: Offers same day service nationwide, customized safety Rx programs, in-house digital processing and on-site AR. VSP, VBA and VCP authorized.

www.poglabs.com

Robertson Optical Laboratories

Founded: 1958

HQ./Main Lab Location: Loganville, Ga.

No. of Locations: 3

No. of Employees: 111

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.

2013 Est. Net Sales: \$18.4 million

Rx Sales: \$17.7 million

No. of Rx Jobs/Day: 1,500

Percentage of Uncut Jobs: 20%

Comments: On-site free-form technology and digital grinding offering service and quality on Carl Zeiss Customized lenses, Shamir Freeform lenses, Seiko Freeform lenses, and ROL Coze Freeform Lenses. Servicing Southeast for over 50 years with new lens products and new technologies. Two on-site AR coating facilities providing AR1, Royal AR coatings, RB Tech, Teflon and Zeiss coatings. Distributes Carl Zeiss, Shamir, Seiko, Signet Armorlite, Vision-Ease, Younger, Hoya, Essilor and other major lens brands. Approved VSP, VBA, VCP contract labs. Authorized EmPower lab. Approved VSP, VBA, VCP contract labs. Authorized emPower

lab. Offers frame and lens packages, specializing in three-piece mounts, wraps and Chemistrie Custom Clips. Member VCA and OLA. Offers online ordering and job tracking.

www.robertsonoptical.com

Superior Optical Labs

Founded: 1991

HQ./Main Lab Location: Ocean Springs, Miss.

No. of Locations: 1

No. of Employees: 47

Key Executives: Hal Walker, president; Jon Jacobs, vice president

Owner: Hal Walker, Jon Jacobs

Trade Names: Personal Lens (digital lens), Exilar and Exilar Plus (AR)

Key Markets: Southeast

2013 Est. Net Sales: \$5.5 million

Rx Sales: \$5.4 million

No. of Rx Jobs/Day: 375

Percentage of Uncut Jobs: 5%

Comments: Specializes in safety contracts, VA eyeglass contracts. Offers in-house digital lens processing. Distributes Varilux Hoya, Younger and Transitions lenses. Produces Crizal coatings in-house. Offers Red Tray program and value packages. Provides ECP education, ABO classes. VSP authorized.

www.superioroptical.com

Three Rivers Optical

Founded: 1969

HQ./Main Lab Location: Pittsburgh, Pa.

No. of Locations: 1

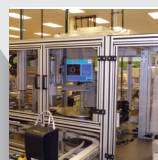
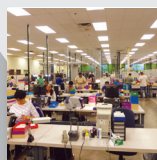
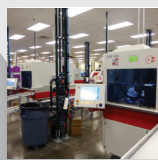
No. of Employees: 68

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

Owner: Seibert Family

Trade Names: None

Key Markets: Mid-Atlantic, Southeast, Midwest,



Northeast

2013 Est. Net Sales: \$18.8 million

Rx Sales: \$18 million

No. of Rx Jobs/Day: 1,525

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: 90

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

Owners: Robert Cotran, Ronald Cotran, Ralph Cotran

Trade Names: US Optical-Fastest Lab in America

Key Markets: National

2013 Est. Net Sales: \$26 million

Rx Sales: \$26 million

No. of Rx Jobs/Day: 1,600

Percentage of Uncut Jobs: 65%

Comments: Proprietary products include Ultimate

HD, Digital AR, Advanced HD, Wrap HD, SV HD, SVWrap HD. Produces Zeiss, Hoya, Essilor, Crizal, Purecoat and Seiko lenses. Offers Carrera XCede program from Safilo.

www.usoptical.com

VSPOne Optical Technology Centers

Founded: 1972

HQ./Main Lab Location: Sacramento, Calif.

No. of Locations: 9

No. of Employees: 800

Key Executives: Don Oakley, president; Warren Meyer, senior vice president, operations; Dave Delle Donne, vice president, business development; Edward Morris, vice president, sales; Swen Carlson, vice president, operations, Central region; Joe Maris, vice president, operations, West region; Danny Singer, vice president, operations, 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.

Key Markets: National

2013 Est. Net Sales: \$165 million

Rx Sales: \$155.1 million

No. of Rx Jobs/Day: 8,500

Percentage of Uncut Jobs: 15%

Comments: Proprietary lens brands include Unity PLx, Unity PLxtra, Unity PLxpression with Cascade Technology, Unity PLxtreme, Reveal and Ethos progressive lenses, Unity SVx Single Vision, Unity SVxtra Single Vision, Unity SVxtreme single vision, Unity CVx computer lenses, Unity Performance Coatings, Unity stock lenses, Unity with BluTech. Special services and programs include VSPOne Rewards Program, Second Pair Program. Offers on-site AR including Unity Performance Coatings and Crizal, Purecoat, Teflon, and Zeiss. In-network digital (customized/free-form) surfacing capabilities producing Unity, VSP Reveal, 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 Associates of Rochester

Founded: 2001

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

No. of Locations: 1

No. of Employees: 115

Key Executives: John Greco, director of lab operations; Jeremy Gnade, director of sales

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Owners: Jeremy Ho

Trade Names: Rochester Optical

Key Markets: National

2013 Est. Net Sales: \$11 million

Rx Sales: \$9.5 million

No. of Rx Jobs/Day: 800

Percentage of Uncut Jobs: 15%

Comments: Produces digital lenses, including Seiko, Shamir, Hoya and RO brands, and Ole AR coating. Offers full-service glass lens processing. Distributes wide range of fashion and military eyewear. Supplies U.S. armed forces, eyecare professionals and corporate customers.

www.rochesteroptical.com

Vision Dynamics Laboratory

Founded: 2007

HQ./Main Lab Location: Louisville, Ky.

No. of Locations: 1

No. of Employees: 70

Key Executives: Galen Powers, president; John Dippold, VP operations; Mike Yager, VP sales

Owners: Jeffrey Plank, Robert Miniutti

Trade Names: None

Key Markets: National

2013 Est. Net Sales: \$9.2 million

Rx Sales: \$5.2 million

No. of Rx Jobs/Day: 600

Percentage of Uncut Jobs: 30%

Comments: Proprietary products include Clearlight, custom photochromics (Sunsmart, Ultrasun, Sun & Fun) custom colored poly (Permatint). Lab-to-lab glass lens specialists.

Walman Optical Company

Founded: 1915

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

No. of Locations: 40

No. of Employees: 1,000

Key Executives: Marty Bassett, president/CEO; Charles Pillsbury, EVP/CFO; Doug Schlauderaff, EVP; Craig Giles, EVP; Jobe Sellers VP; Irland Tashima VP; Bryan Schueler VP

Owner: Employee-owned

Trade Names: Walman Optical, Soderberg Optical, Harbor Optical, Toledo Optical, Rite-Style Optical, SEOCO Optical, Walman Soderberg Instruments, X-Cel Contacts, Hydrogel Vision Corporation, ImageWear, Ultra Optics, ADO Buying Group, Preferred Select Buying Group

Key Markets: National

2013 Est. Net Sales: \$275 million

Rx Sales: \$160 million

No. of Rx Jobs/Day: 8,000

Percentage of Uncut Jobs: 20%

Comments: State of the art digital surfacing and AR capabilities, producing Varilux, Shamir, Zeiss, Seiko, and digital house brand lenses on site, as well as Crizal, Zeiss, Ultra, and house brand AR. Provider lab for both VSP and EyeMed orders. Online Rx order submissions accepted through major portals including DVI Remo, Eyefinity, and VisionWeb. ADO ONE program powered by the ADO Buying Group. Featuring educational seminars Walman U, North Focus University, ADO seminars, and partnering with Transitions and The Williams Group on training and education events. Industry's largest independent consultative sales force. Proprietary products include Callaway, London Fog, Stepper Eyewear, Sundance, Wiggles and Wildflower frames. New tablet and Internet tools include the new SpecTech iPad app and system, Innexus Web site systems, and Response Element for online ordering of marketing materials. Members of Transitions Heritage Labs.

www.walman.com, www.oseyes.com, www.ado-buying.com, www.toledooptical.com, www.rite-style.com ■

READ MORE ONLINE:

To download a PDF of VM's 2013 Top Labs Report, visit VisionMonday.com.