



Global Operations Unmatched Advantage – Innovation & Scalability

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Forward Looking Statement

During this presentation and corresponding commentary we may make forward-looking statements, including statements regarding Align's strategy for future growth, plans related to global expansion of operational presence, our expectations regarding our ability to develop and commercialize new products, planned geographic expansion and anticipated impact on our growth, our expectations related to sales force coverage on, among other things, customer adoption, as well as statements related to Align's business outlook for 2016 and beyond. Any such forward-looking statements contained in this presentation and corresponding commentary are based upon information available to Align as of the date hereof. These forward-looking statements are only predictions and are subject to risks, uncertainties and assumptions that are difficult to predict. As a result, actual results may differ materially and adversely from those expressed in any forward-looking statement. Factors that may cause such a difference include, but are not limited to, the factors that are discussed in more detail in Align Technology's Forms 10-K and 10-Q, as well as in other reports and documents filed from time to time with the Securities and Exchange Commission. Align undertakes no obligation to revise or update publicly any forward-looking statements for any reason.

Unique Challenges Require Unique Solutions

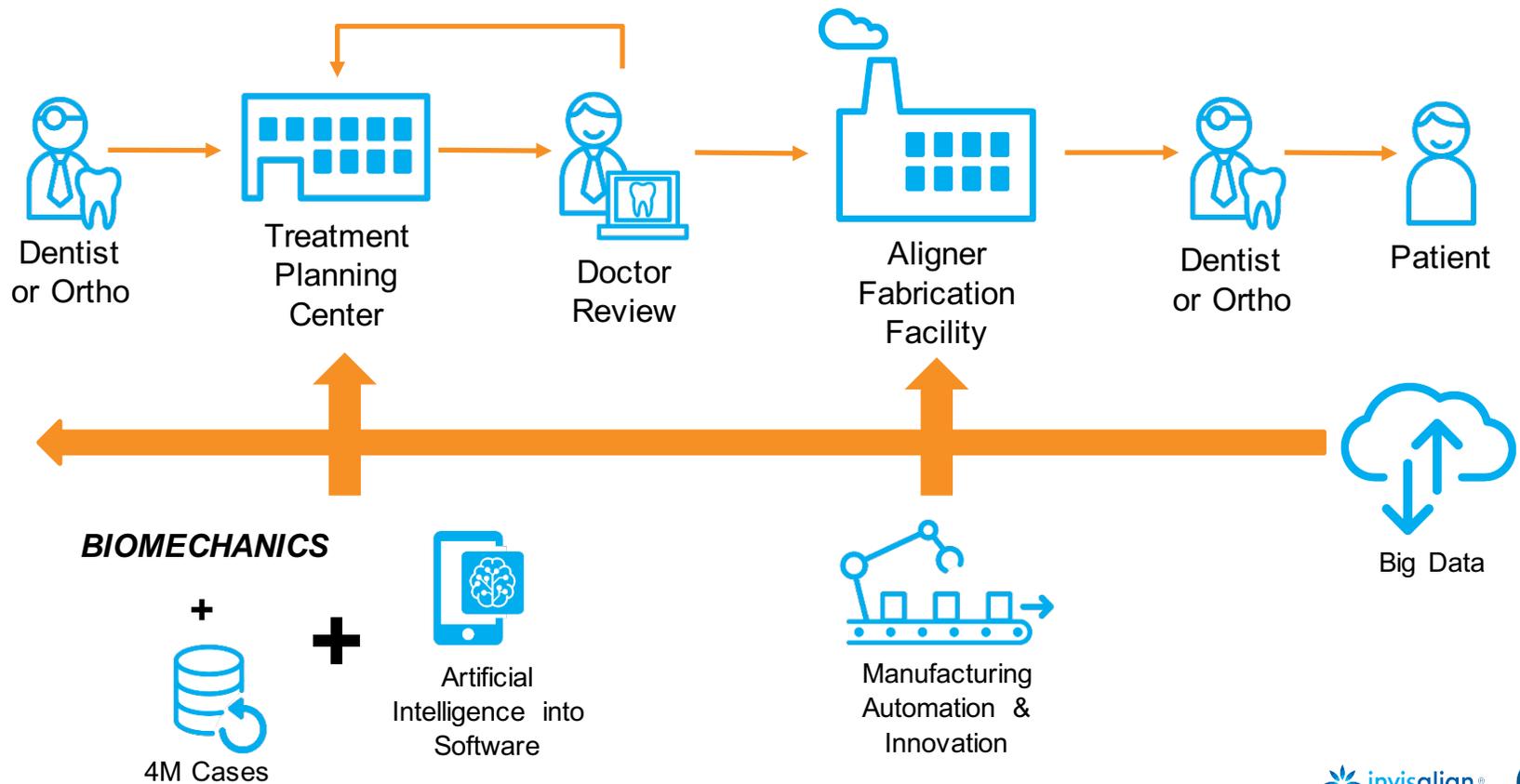
**Conceptually Easy...
But in Reality
Hard to Do**

**Small, Light, Clear, Unique...
No 2 Patients or Appliances
Are the Same**

**Mass Customization
Required to Scale...
180K Unique Appliances
Each Day**

**Simple Yet Complex
Business Model...
High Mix, High Volume,
Built to Order**

Align's Operations Value Chain is a Significant Competitive Advantage



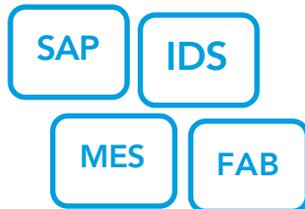
Seamless Global Management of Data

Highly Integrated Ecosystem to Deliver Custom Treatments & Aligners

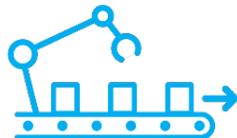
Cloud Computing



Real-time Data
Redundancy and
back-up



Enterprise
Application
Integration



Manufacturing
Automation &
Innovation

2.9M Files/Day

Move through ecosystem to enable
production

15 Terabytes/Day

Downloading 4.3M songs or 6300 full-
length HD movies

1.5M Lines of Code

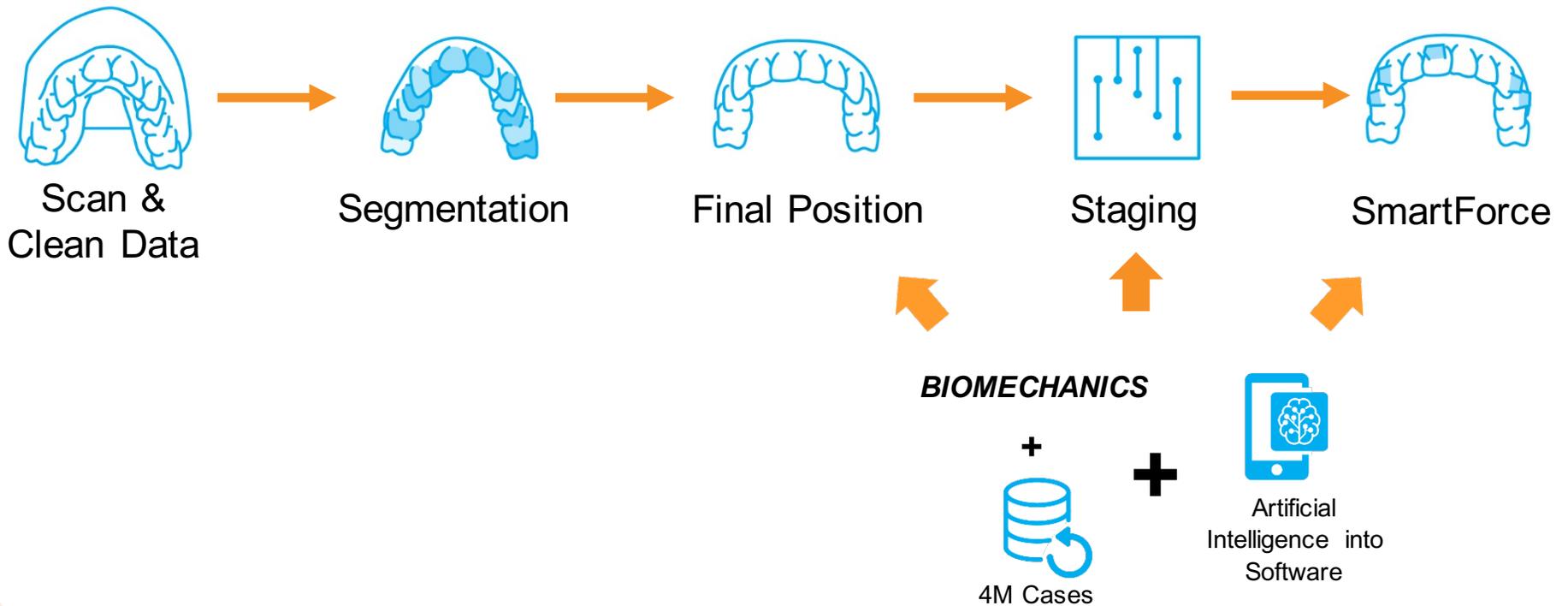
In treatment planning software

26B Instructions/Day

Exchanged between automated systems
to coordinate and record production

Invisalign Treatment Planning Overview

Continuous Evolution of Our Technology



Final Position with First Generation Software

Enabled visualization for End-to-End Treatment Planning



Final Position

EARLY GENERATION SOFTWARE

VIDEO NOT AVAILABLE

- Technician Procedures
 - Studied Rx from doctor
 - Manually moved each tooth
 - Each movement may have created collision with adjacent teeth
 - Heavily dependent on technician capabilities
- Average treatment set-up
 - > 1 hour to complete
- Many in industry still do it this way

Final Position with Intelligent Software

Clinical Intelligence Built-in



Final Position

ADVANCED SOFTWARE – NON EXTRACTION

VIDEO NOT AVAILABLE

- **Technician Procedures Now**
 - Applies customer clinical decisions
- **Software Interprets**
 - Interprets decisions
 - Understands acceptable orthodontic norms
 - Determines best solutions
 - Less dependent on technician capabilities
- **Average treatment set-up**
 - 1/4 of the time to complete

Final Position with Intelligent Software

Facilitates Easy Changes/Options Around Clinical Decisions



Final Position

ADVANCED SOFTWARE - EXTRACTION

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- **Technician Procedures Now**
 - Applies customer clinical decisions
- **Software Interprets**
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Tooth Sequencing/Staging

Empirical Evidence Based on 4M Cases



Staging

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- Software understands prescribed movements needed for final position & staging
- Software moves teeth at right speed and at right time

SmartForce System

Based on Biomechanic Principles & Clinical Results



SmartForce

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- Software understands prescribed movements needed for final position & staging
- SmartForce features placed automatically to ensure movements will happen

Continuous Automation Will Improve Customer Experience

Multiple Treatment Plan Options Simultaneously

Multiple Treatment Options View for Doctors*

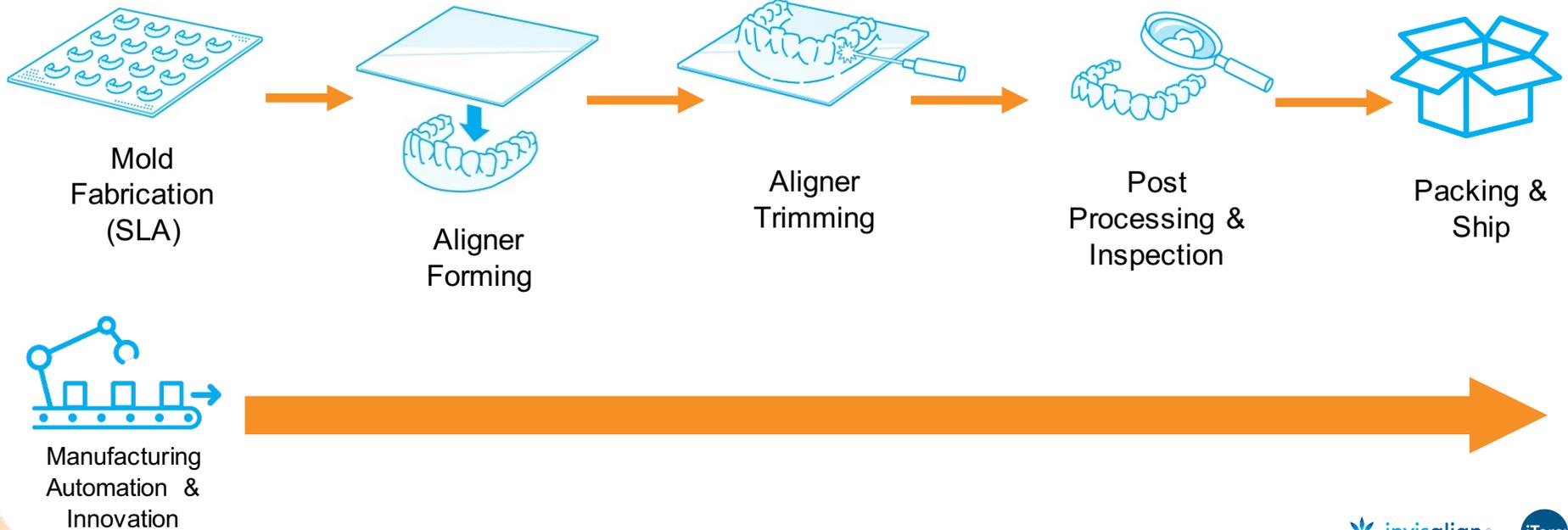


- Multiple treatment options available chair-side enables clinical decisions directly, real-time
- Enhances the patient experience and helps drive patient conversion
- Treatment plan will go directly to fabrication resulting in:
 - Significant reduction in lead-time
 - Significant reduction in doctor time

* There is no assurance that these potential products/features will be commercialized and be commercially viable. In addition, regulatory submission may be required to support commercialization of one or more of these products.

Align's Manufacturing Capabilities

Pushing the Limits of Custom Mass Manufacturing

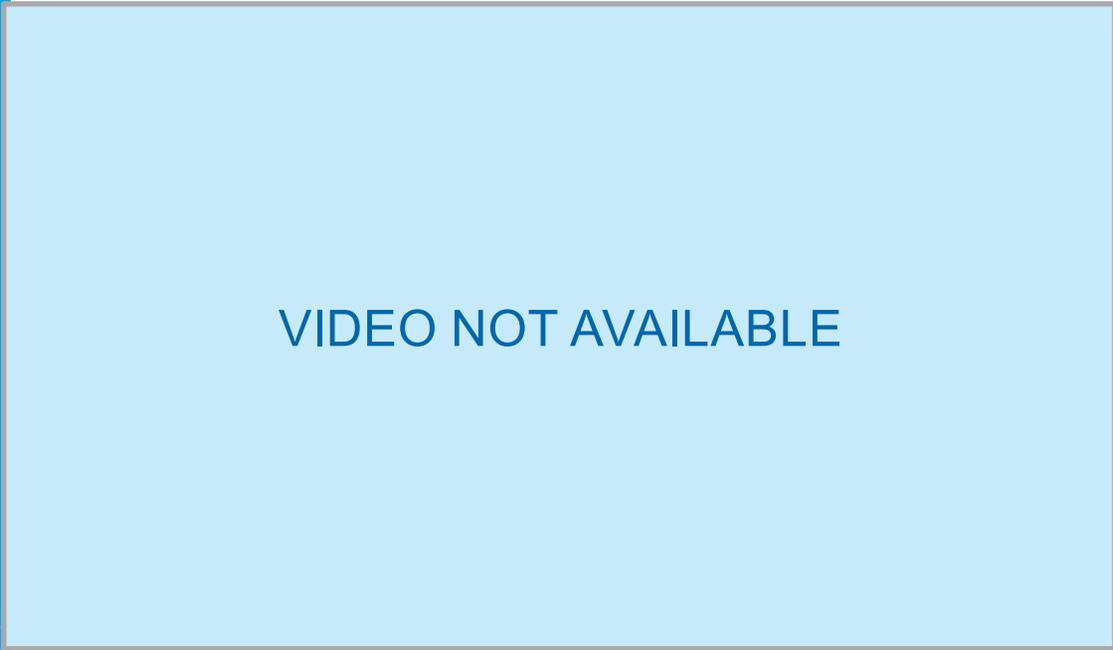


Complexity of Aligner Mold Fabrication Processing

We Pioneered Use of Technology in Manufacturing



Mold Fabrication (SLA)



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Off-the-Shelf 3D Printers Can Not Do What We Do

Significant Development Needed



Mold Fabrication
(SLA)

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- **Technical Hurdles**
 - Part accuracy
 - Part integrity
(collapse in forming process)
 - Part Cost
- **Take best scenario from technologies**
 - 1/2 accuracy
 - 15-20X build time
 - 1/10 efficiency
 - 10X scrap
 - 10X cost

Off-the-Shelf 3D Printers Can Not Do What We Do

Know-how and Technical Capability Key to Making it Work



Mold Fabrication
(SLA)

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- Even if solve hurdles, secret in the room is still need to:
 - Solve post processing challenges
 - Build/acquire & maintain engineering capability to evolve
 - Build/acquire & maintain maintenance capability ensure equipment calibrated/running
- There is no gluttony of these skills sets

What About Printing Aligners Directly?

Align Will Be at the Forefront of This Evolution



- Three Primary Problems
 - Mechanical Properties
 - Bio-compatibility
 - Clear
- Material does not exist that meets all needs
- Post processing & support will still need to be addressed
- Align is investing heavily and will drive this next phase of technology evolution*

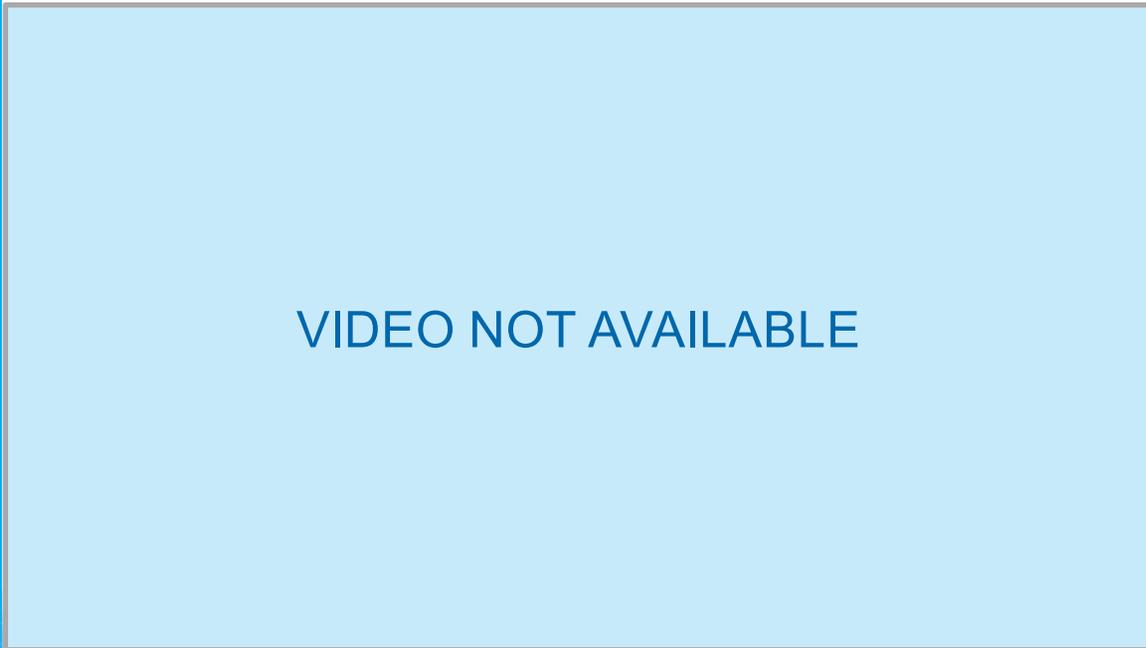
* There is no assurance that direct printing of aligners will be commercialized and be commercially viable. In addition, regulatory submission may be required to support commercialization of aligners that are directly printed.

Continuous Technology Evolution in All Areas

Example: Laser Trimming Advancements



Aligner Trimming



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PhotoMachining, Inc.



Continuous Technology Evolution in All Areas

Example: Laser Trimming Advancements



Aligner Trimming

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1. Technical Hurdles
 - Laser motion control
 - Laser impact on aligner characteristics
 - Laser Power modulation
2. Industry unable to solve issues directly
3. Required our algorithm and automation capabilities to build feasible platform

Continuous Technology Evolution in All Areas

Example: Laser Trimming Advancements



Aligner Trimming



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Laser Trimming Vendors

	Vendor 1-5	Vendor 6	Vendor 7...	Final Vendor w/Align Innovation
Motion Control	<i>Declined to Participate (Beyond Capability)</i>			
Power modulation				
Cost and design				

- 4-5 years of testing, modifications, research
- Burned through 10 vendors

Manufacturing Evolution and Innovation

Almost 20 Years of Advancements

Phase 1 – Manual Operations

- Labor intensive, 100% manual forming, trimming, and packaging

450 people	5,000 per day	X Quality Measure	\$Y Cost/aligner
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Phase 2 – Islands of Automation

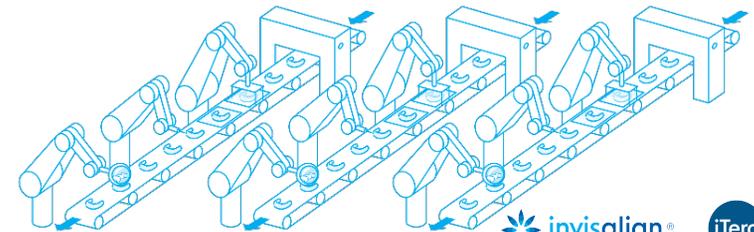
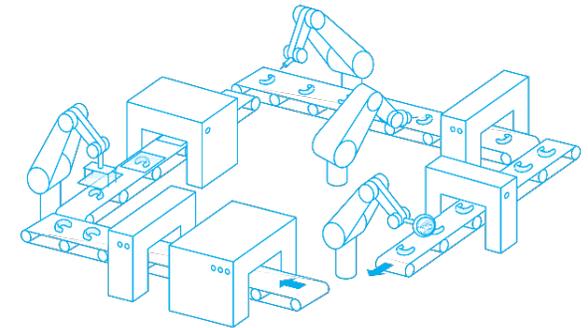
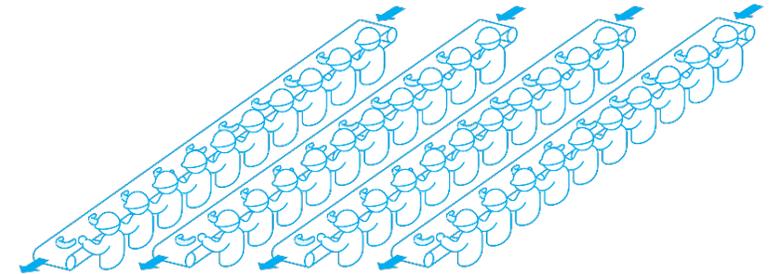
- Semi-automated forming, trimming, and packaging that we had to invent and custom design

470 people	25,000 per day	2X Quality Measure	-66% Cost/aligner
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Phase 3 – Fully Automated with a Modular Design

- 2nd/3rd generation designs with smaller footprint, higher throughput

1500 people	140,000 per day	5X Quality Measure	-85% Cost/aligner
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Designed for Scalability and Growth

Extending Our Leadership and Operational Global Presence



Operational Expansion Underway

- Bring our operations into major markets (EMEA & APAC)
- Local language, time-zone and business culture
- Shorter lead-times & better responsiveness
- Accelerate growth

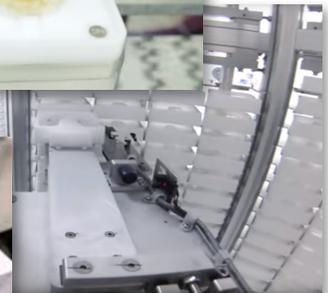
Longer-Term Plan

- 6 Treatment Planning locations in EMEA
- 3 Treatment Planning Locations in APAC
- 1 Order Acquisition & Fabrication location in EMEA
- 1 Order Acquisition & Fabrication location in APAC
- 1 Order Acquisition & Fabrication location Specifically for Japan

Innovation and Technological Know-how

Continue to build expertise and intellectual property

- **Mass customization and data management**
- **Improving 3D object fabrication process**
- **Automation in large scale fabrication of custom objects**
- **Identification and tracking of unique 3D printed objects**
- **High throughput thermal forming**
- **Precision laser trimming of unique objects**
- **Sorting and sequencing of high volume customized objects**



Continuous Innovation Designed for Scalability



- Continuous investment in technology and software development
- Competitive advantage across our unique value chain
- Designed for scalability to meet the demands of rapidly expanding customers
- Committed to future technology and platform transformations



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