



Asia Pacific Region

Investor Day - June 2, 2016

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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.

APAC Overview 2015



>5K
Active
Doctors

11%
Volume

120
sales team

Trained
>12K

40%
Volume
Growth

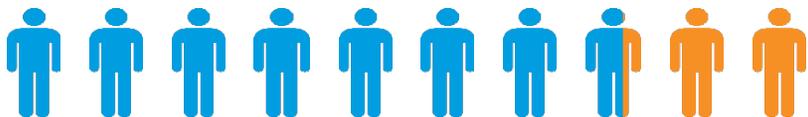
APAC Business and Market Dynamics

Business Shape



60%
Orthodontists

40%
General Dentists



78% Adults

22% Teens

Market Dynamics

Extremely complex, diverse and yet fastest growing

Mostly orthodontists in China, Japan, Korea and India

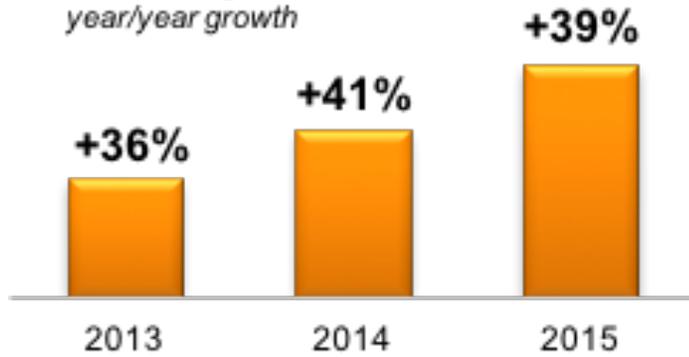
Doctors are extremely keen to look at new technologies and embrace

Most established in Japan and Australia

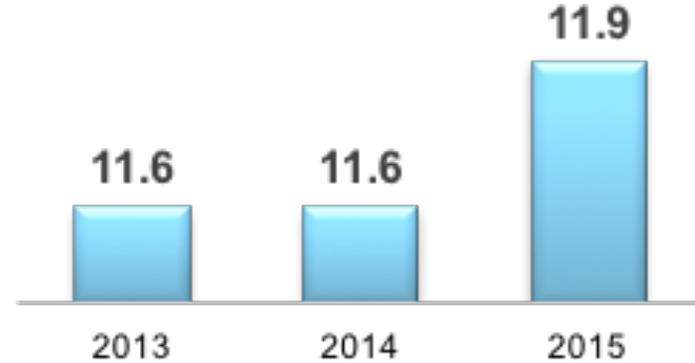
APAC Highlights

Invisalign Volume

year/year growth

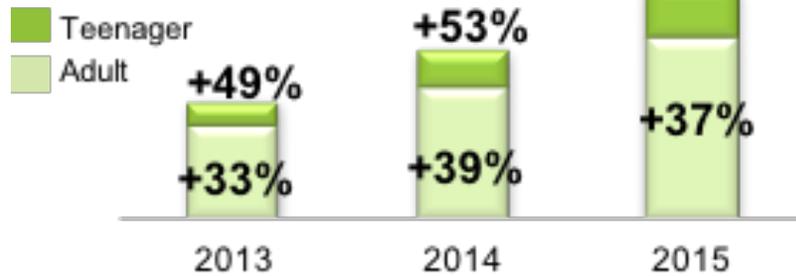


Cases/Doctor



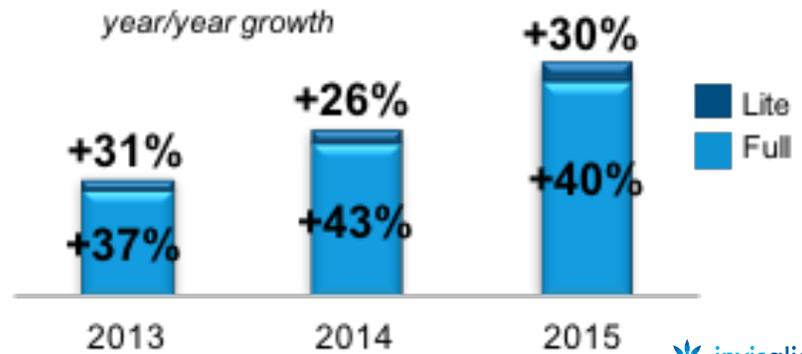
Teenager vs. Adult

year/year growth

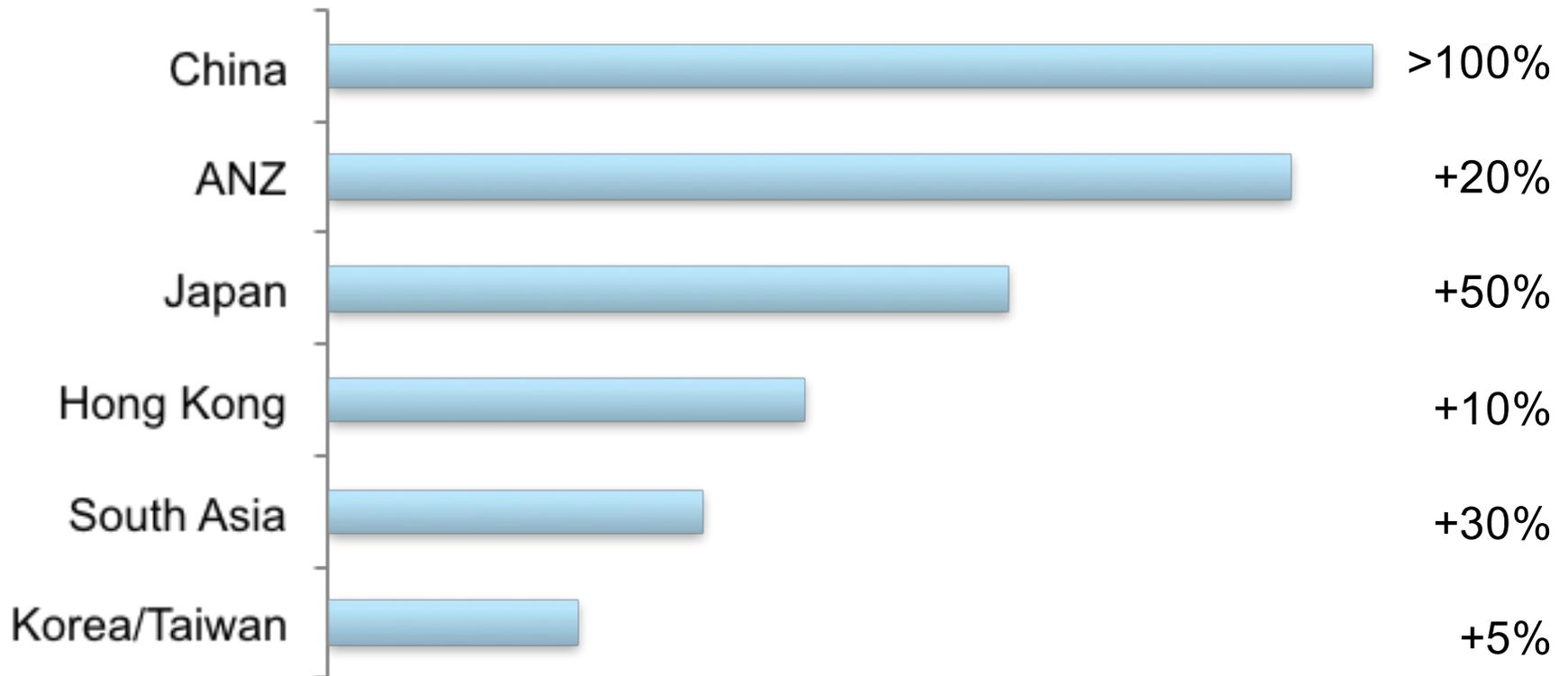


Full vs. Lite

year/year growth



2015 APAC Performance by Country/Region



Key Success Factors



Clinical Education



New Innovations



Sales Force
Effectiveness/Coverage

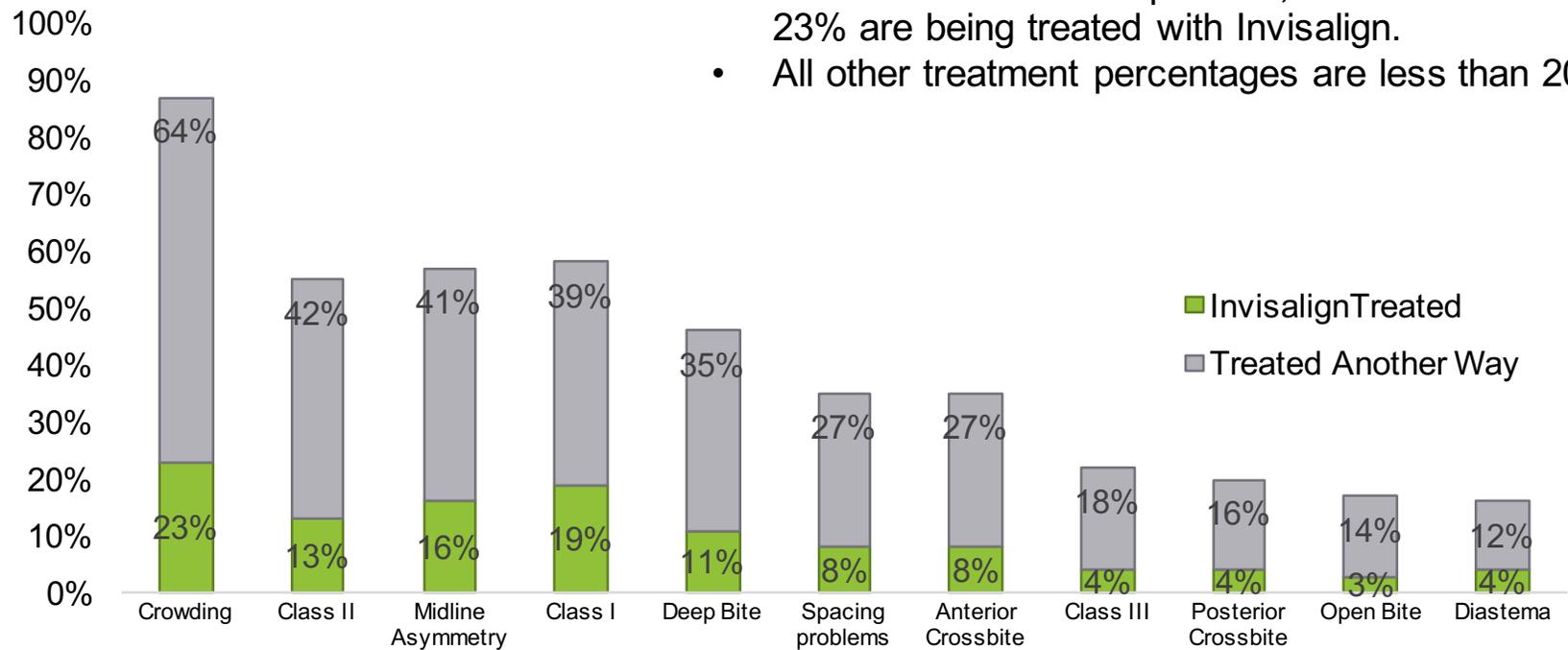
Clinical Education

- Complete curriculum and hands-on training for 2 ½ days
- Define curriculum for various doctor levels of interest/competency
- E-modules available before face-to-face
- Localized materials



New Innovation To Address Complexity Range

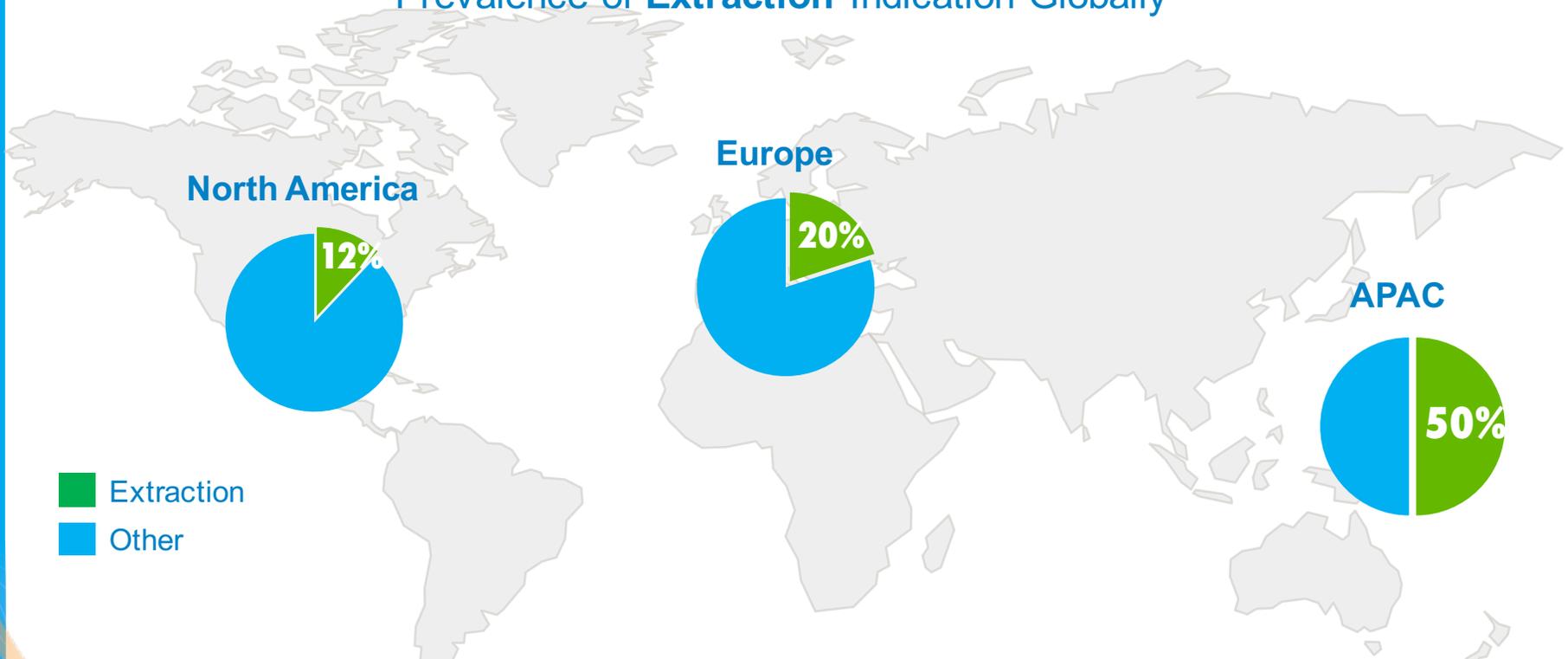
APAC Invisalign Opportunities *Complexity of Malocclusion*



- Crowding patients in APAC account for 64% of all orthodontic patients, and 23% are being treated with Invisalign.
- All other treatment percentages are less than 20%

Innovation That Matter – Invisalign G6

Prevalence of **Extraction** Indication Globally



SOURCE: Align Technology research and internal reports
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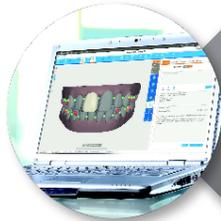
Innovations That Matter

APAC doctors are leading complex case management with Invisalign G6 globally

60% of doctors using Invisalign G6 are from APAC

More than 4,000 extraction cases done with Invisalign G6

Sales Force Effectiveness



Systematic training program,
selling the science



TFM across markets



A lot of role-playing!

Key Focus for APAC

*Geographic
Expansion &
Coverage*

*Education
Training &
CE*

*Consumer
Demand
Localized &
Integrated*

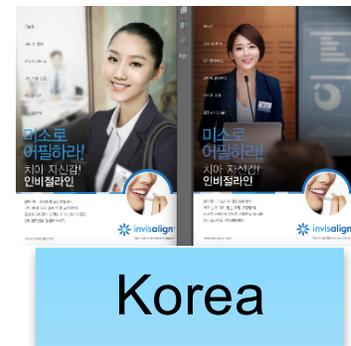
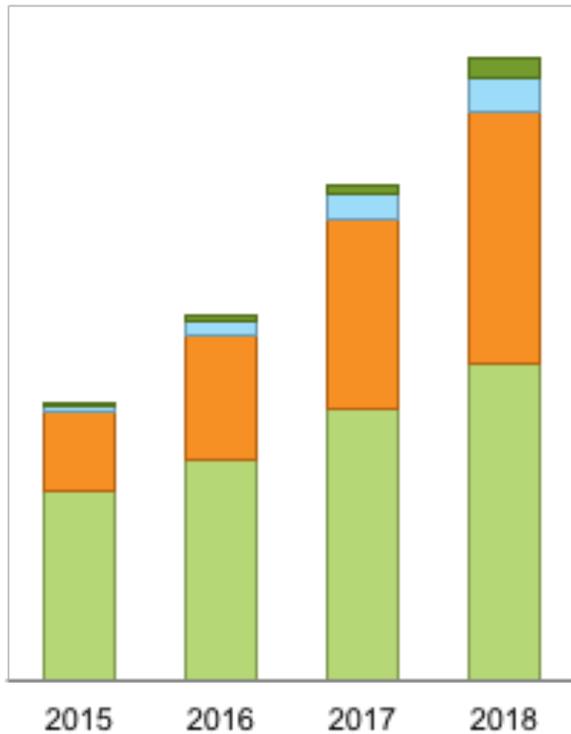
*Innovation
that Matters*

*Enhanced
Customer
Experience*

Integrated Market Development Approach
Adapted to Each Country's Dynamics

Geographic Expansion – Deep and Wide

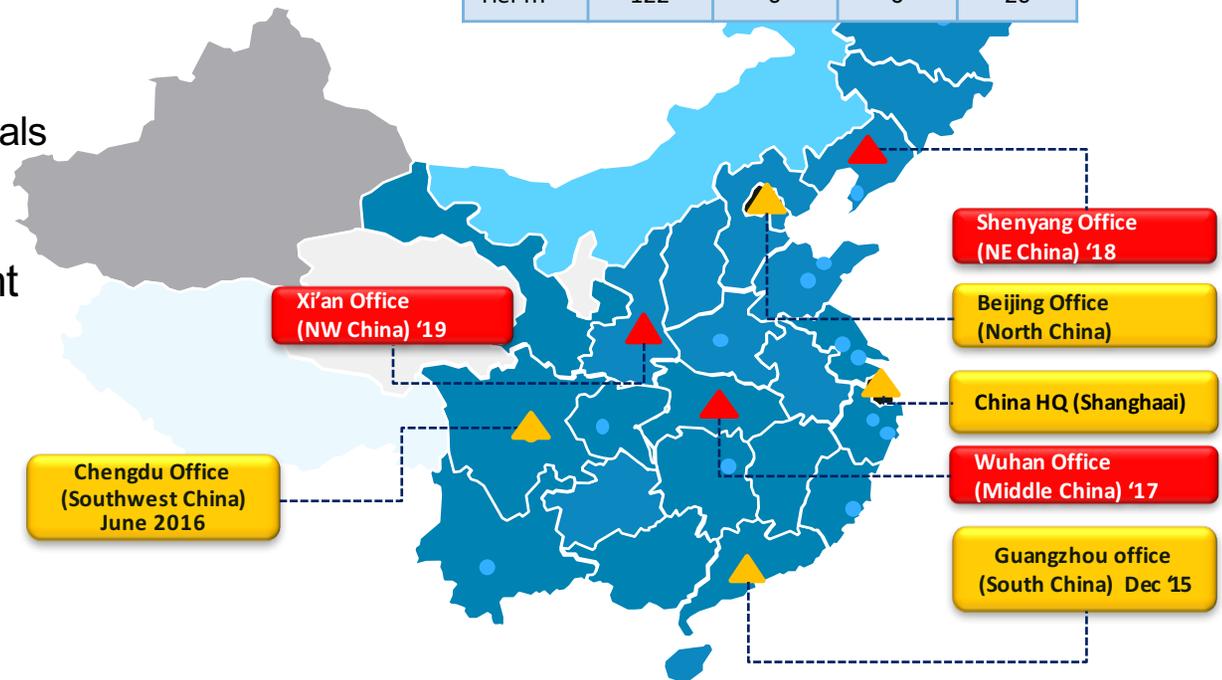
■ Core APAC ■ China ■ Korea ■ India



China Geographic Expansion is Key

- Market size and potential
 - ~ 500K Ortho case starts per year
- Customer segments
 - Top private clinics/chains
 - Top public university hospitals
 - Beauty hospitals
- 100% out of pocket payment

City	City#	2015 Cover	2016 Cover	2017 Cover
Tier I	5	5	5	5
Tier II	28	20	28	28
Tier III	122	0	0	20



Driving Utilization in China is the Same, Yet Different

PUBLIC HOSPITALS



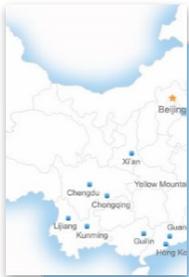
70%

PRIVATE CLINICS



30%

Strategy for China



Geographic Expansion

- Tier 2 Tier 3
- Increase confidence through education



Customer Engagement

- Research
- Localization of support
- Suitable business model and product



Build Awareness

- Build brand and product awareness
- Drive conversion

Korea Growth Opportunity

- Market size and potential
 - #1 aesthetic market in Asia
 - ~200K Ortho case starts per year
 - Clear aligners are <15% cases
- Customer segments
 - Top private clinics
 - Mainly Ortho channel
 - GP/Ortho with aesthetic interest



Korea Strategy



Customer Engagement

- Secure Orthodontists' endorsement and share of prescriptions



Brand Awareness

- Drive brand differentiation
- In-clinic branding
- Social media
- Consumer marketing



Product Differentiation

- Differentiate Invisalign from other aligners
- Invisalign as treatment for all malocclusions, including complex cases

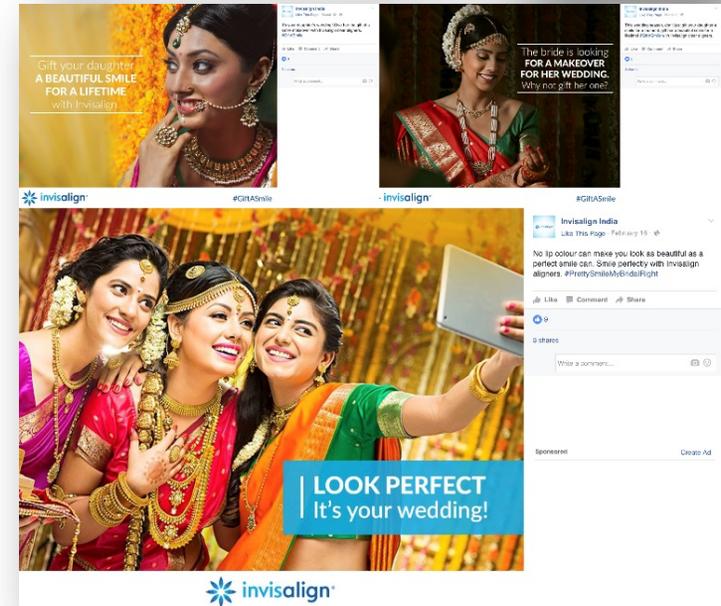


Team Development

- Build internal capabilities

India Growth Opportunity

- Market size and potential
 - 4000+ Ortho, with ~500 professionals accredited every year
 - 300K Ortho case starts per year
 - Focus on top 15 cities
- Customer segments
 - Mainly Orthos
 - Private clinics



Strategy for India



Geographic Expansion

- Cover top 10 cities in 2016
- Increase confidence through education and local support



Customer Engagement

- Private Practices: Grow customer base and drive utilization
- Partner India Orthodontist Society



Build Brand Awareness

- Build brand awareness and product awareness via consumer activities
- Drive conversion via “study clubs”

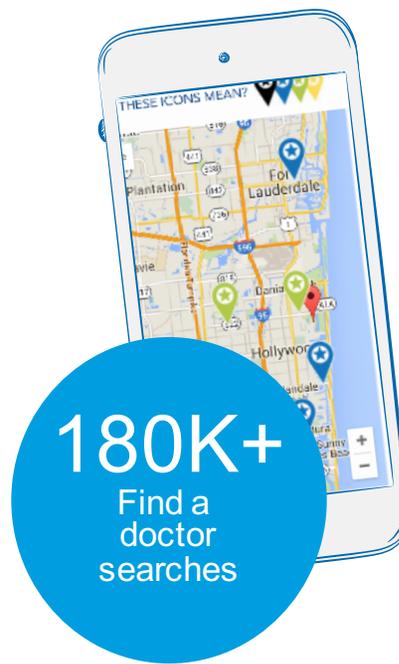
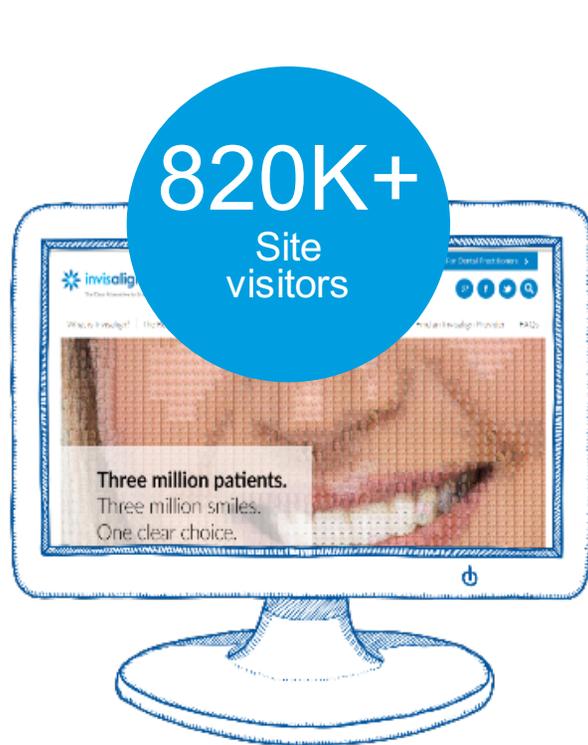
Training and Education

- **Centralized Training Center**
 - Train thousand of doctors systematically
 - Roll out training centers across China
 - Similar to actual setting with actual patients and hands on education
- **Customer Training Program**
 - Catered to doctor level of experience and needs



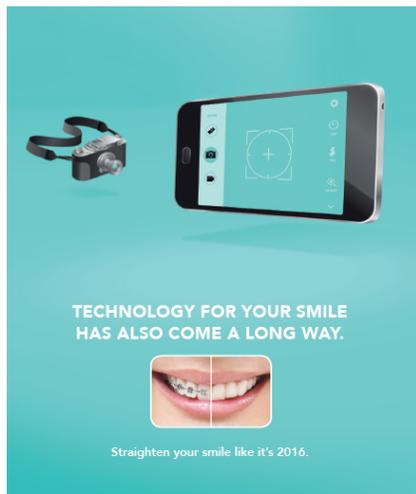
2015 Consumer Marketing Highlights

Varies by Country/Region due to Legal Restrictions



Consumer Campaigns – Australia

Create a Sense of Urgency and Drive Conversion



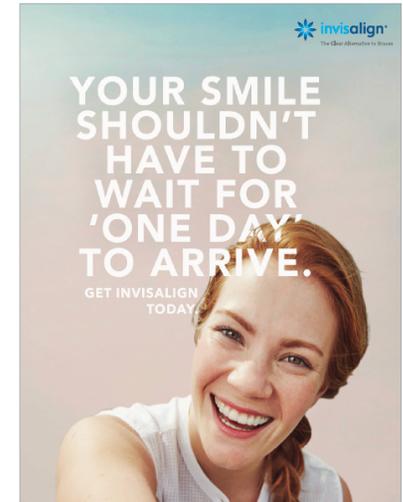
Find an Invisalign provider at invisalign.com.au
Invisalign treatment requires a prescription. Your orthodontist will advise if this product is suitable for you. Results vary.



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Visit invisalign.com.au to find your nearest Invisalign provider.



You can get Invisalign for as little as \$74 a week.
 Visit invisalign.com.au to find your nearest Invisalign provider.

Teens and Technology

“One Day”

Consumer Campaign – China

Create Awareness and Differentiation



Innovation That Matter – Personalized Messaging



GP Dentist Segment

Prepare for Leadership Position in China and Japan

Investing in research to understand GP needs

Focus on type of clinical training

Type of malocclusions GPs see

Different support model needed

Likely a different product for this segment

Enhanced Customer Experience

- Manufacturing and Treat Operations in APAC
- Closer to our customers to be more responsive to their needs
- Change the rules of engagement with doctors



Our APAC Goals by 2020....

More than 5X sales and become significant percentage of total worldwide revenues

China will be the second largest market for Invisalign globally

Significant increase in treatments from GPs

We will a leading player in the Teen segment

We will be an indispensable partner to our customers

The best trained and most valuable team



invisalign®

