Europe, Middle East & Africa (EMEA)

Investor Day - June 2, 2016

Simon Beard

Vice President & Managing Director EMEA

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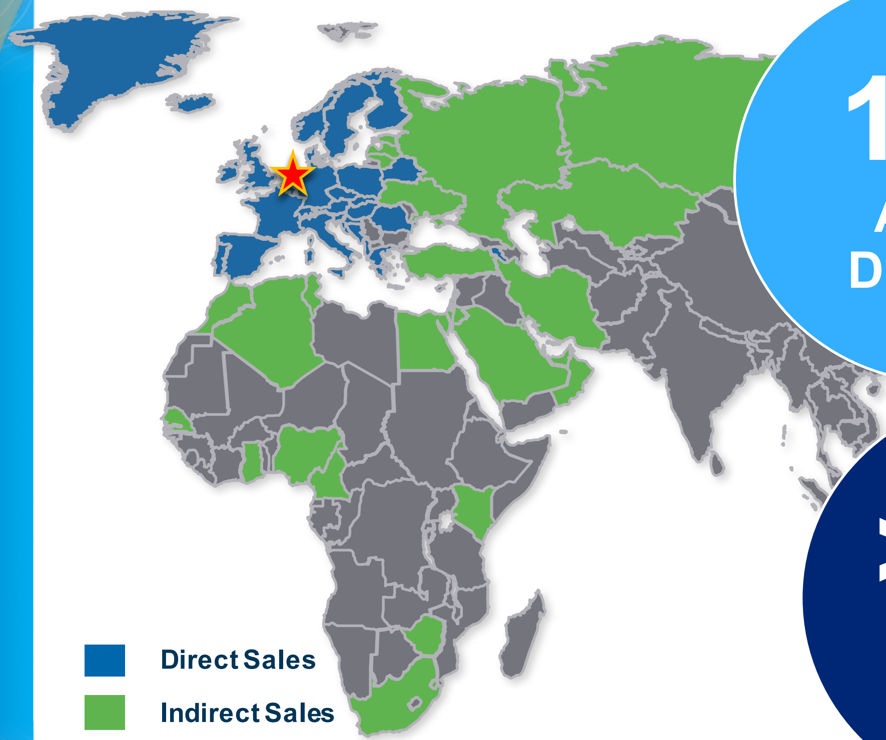
ALIGN TECHNOLOGY, INC.

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.

EMEA 2015 - Significant Growth and Expansion



Direct Sales

Indirect Sales

EMEA HQ – Amsterdam

11K Active Doctors

105 Sales Team

21% Volume

>20K Doctors Trained

30% Volume Growth

Note: metrics as of 2015

EMEA Business and Market Dynamics

Business Shape

90% Core

10% Expansion

77% Orthodontists

23% General Dentists

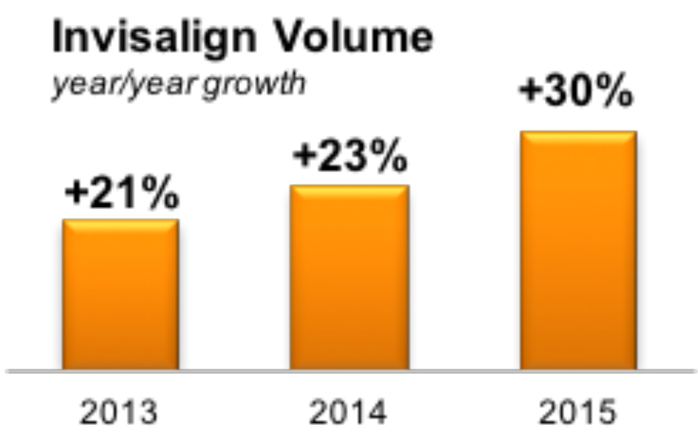
80% Adults

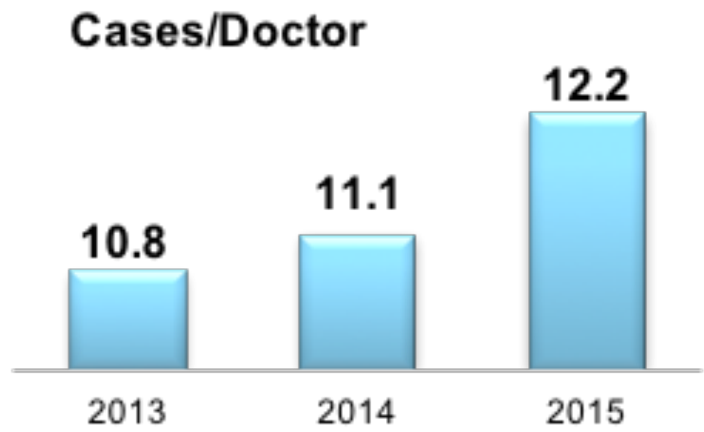
20% Teens

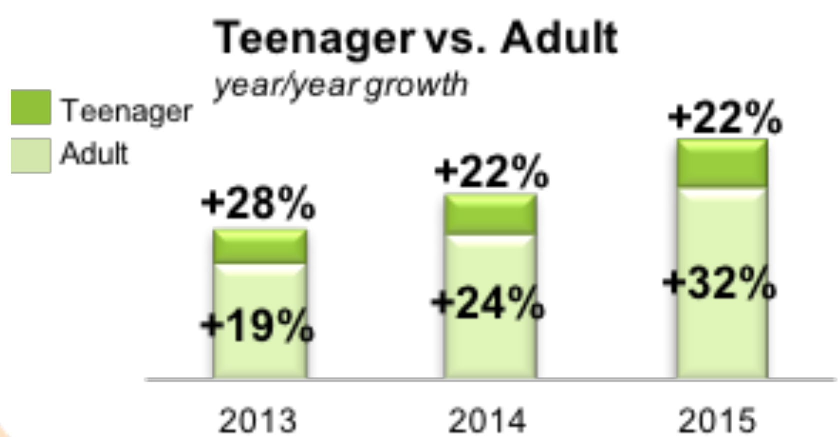
Market Dynamics

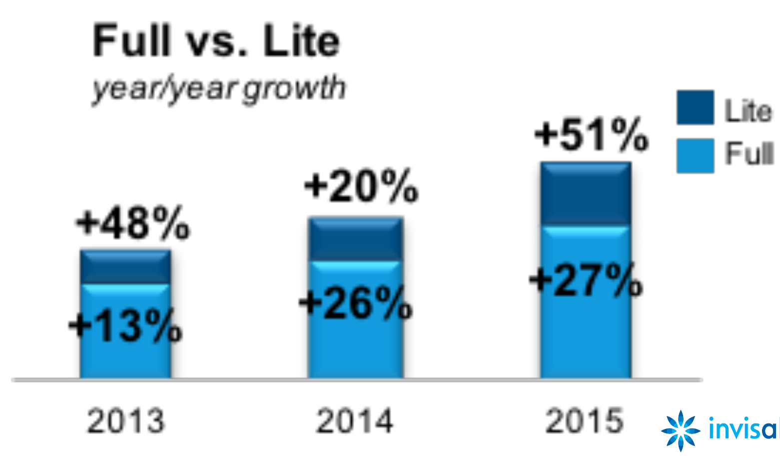
Economic	Fragile consumer confidence Consumer affordability (2-4x more expensive than W&B)
Re imbursement	Mainly affects Teens
Legal	Direct to consumer restrictions Restrictions on Doctors advertising
Culture Language	Diverse, complex.
Technology	More conservative

EMEA Highlights









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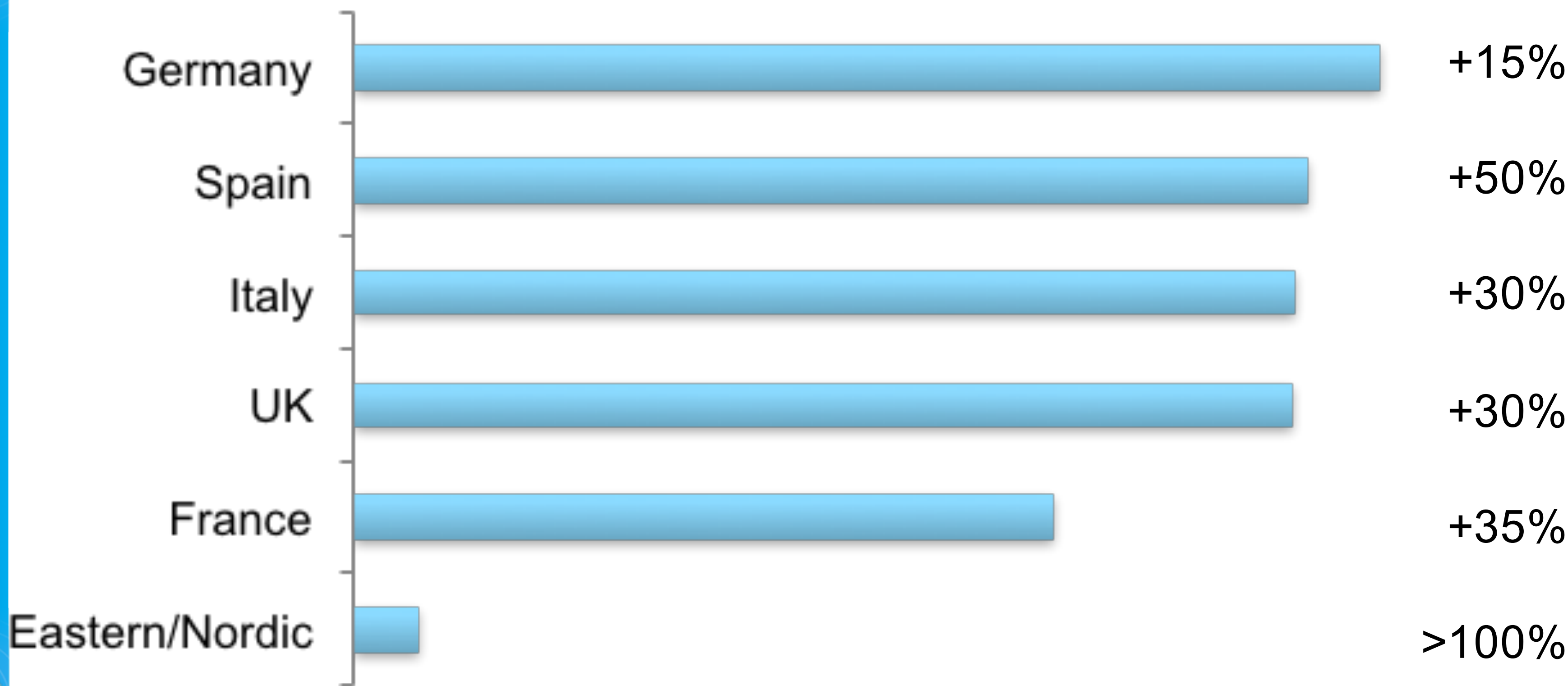
2015 EMEA Performance by Country/Region



Align estimates. Chart not to scale.

EMEA Growth Drivers

Accelerate Clinical Confidence

Drive Channel Partners

Deeper Channel Focus

Expand Geographies

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Global Strategic Priorities

International Expansion

Ortho Utilization

GP Dentists Treat & Refer

Patient Demand & Conversion

Global Strategic Priorities – International Expansion

International Expansion

Ortho Utilization

GP Dentists Treat & Refer

Patient Demand & Conversion

International Expansion

- Salesforce Investment – (Ortho) TFM Clusters, iTero, GP
- Build Infrastructure – OA Center (May ‘16), TREAT, Fabrication
- Geographic – Middle East, Russia, Eastern Europe

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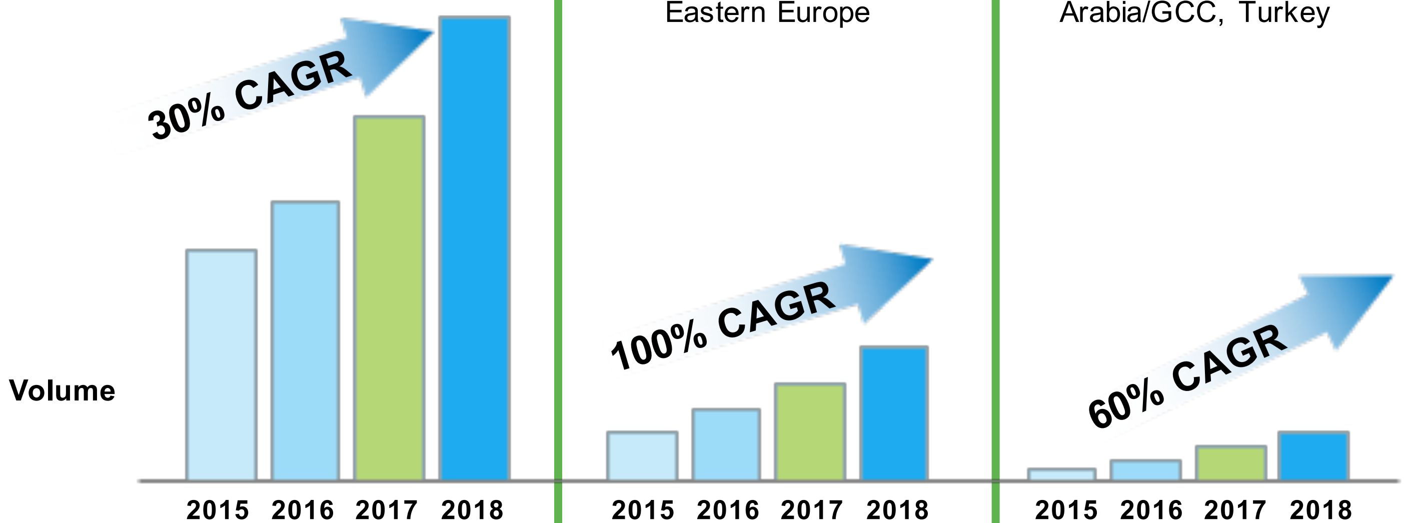
International Expansion: EU Markets

Core Markets
Western Europe

New Markets
Scandinavia, Benelux, Eastern Europe

Indirect to Direct Markets
Russia, Saudi Arabia/GCC, Turkey



Core Markets
- TFM approach
- Dedicated GP/iTero sales
- Segmented focus

New Markets
- Build coverage: cities / sub-regions
- Launch GP Product / iTero
- Pilot new GTM approaches

Indirect to Direct Markets
- Direct to Align overtime
- Local distribution partnerships

Align estimates. Chart not to scale.

Global Strategic Priorities – **Ortho Utilization**

International Expansion

Ortho Utilization

GP Dentists Treat & Refer

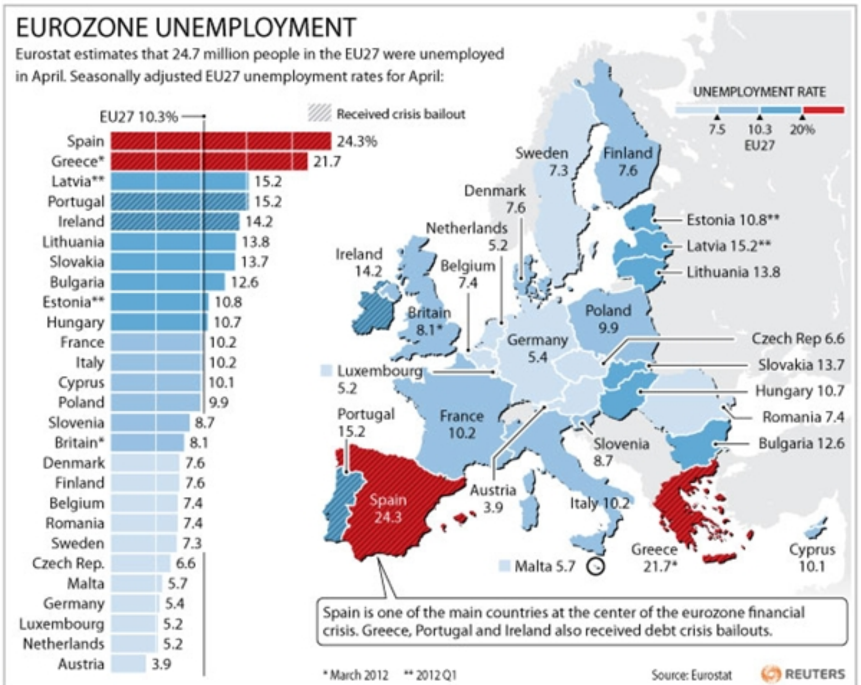
Patient Demand & Conversion

Ortho Utilization – rapid acceleration

1. TFM - accelerating Clinical Confidence, NPS
2. Deep Bite (G5) Focus: 45% potential
3. Channel Partners – commercial, education

Accelerate Clinical Confidence - TFM

Learnings from Spain



- Hardest hit from economic crisis
- No additional resources so created a new selling approach
- **Touchpoint Frequency Multilayer (TFM)**
  - Right customers, Right frequency
  - Individual customer plan with commitment
  - Clusters: Customer Care, Clinical and Sales
  - Intensity: drives change and independence

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TFM Clusters - Drive Clinical Confidence

Steep "***learning & confidence curve***"

Multiple, intensive & ***coordinated resources***

Focus greater resource on a smaller group

30 docs **70%** **90** days

create "independent" doctors and drive momentum

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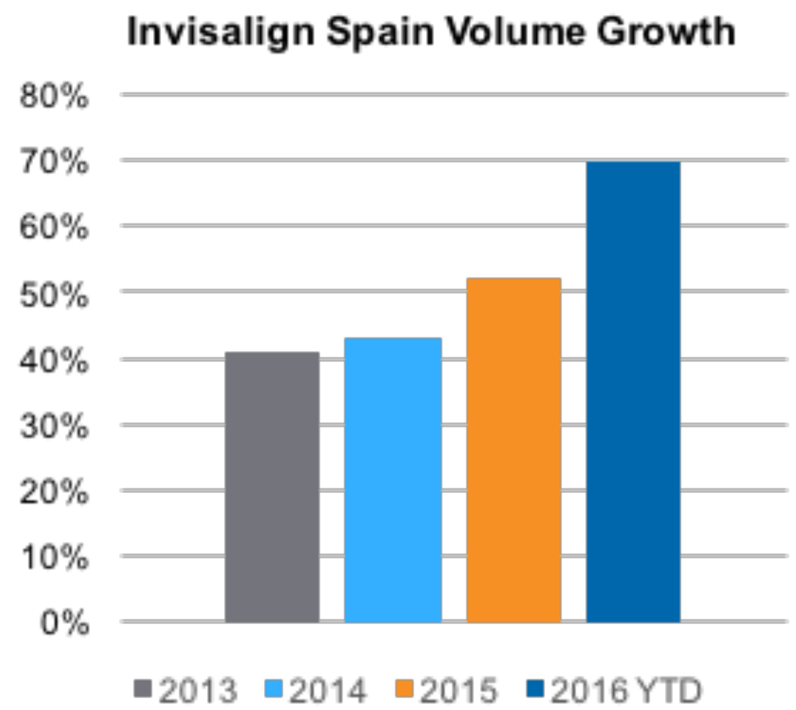
TFM – Results and Next Steps

- Growth continues to accelerate – Iberia now 25% of EMEA in 2016
- Significant increase in NPS, i.e. how customers' experience Invisalign
- All Core EMEA Markets now using this go-to-market model
- Next:
  - New segmentation/targeting model
  - CRM capability to increase efficiency
  - TREAT close to customer (TFM plus)



Align estimates. Chart not to scale.

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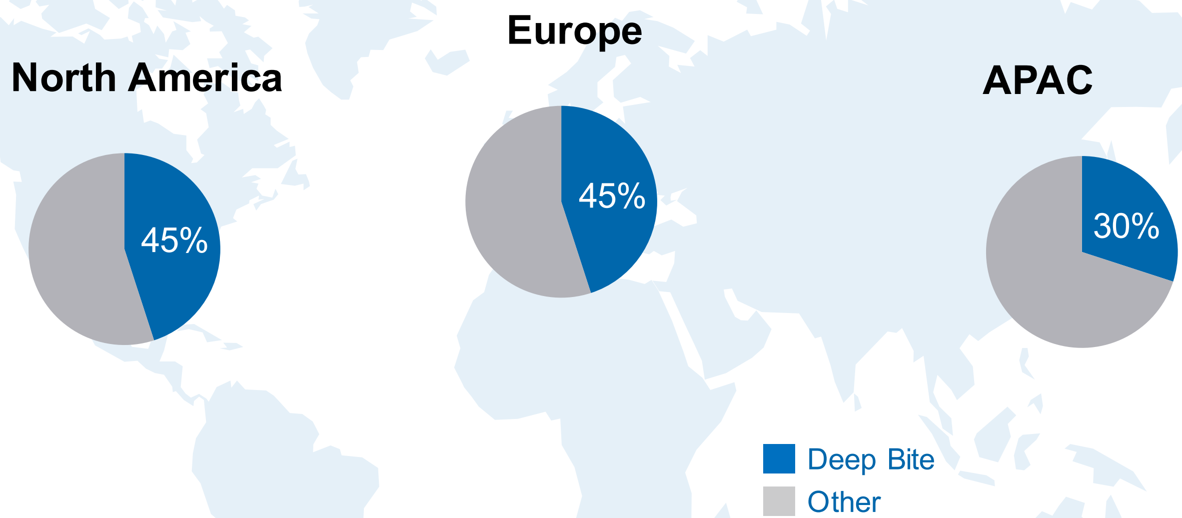
Drive Growth – Deep Bite Opportunity

45% (570K) Cases in Europe per year



Tapping into Deep Bite with Invisalign G5 – opens up significantly more cases per year

SOURCE Align Technology research and internal reports.:

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Focus on the Largest Opportunity - Deep Bite

- Leveraging product superiority - clear benefits over W&B
- Deep Bite Confidence Program
  - Specific Education
  - Case Selection Tool
  - Treatment Planning focus
- YTD growth - >30% growth

Precision Bite Ramps

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Driving Channel Partners

Commercial Networks – Power of Peer to Peer

1. Invisible Orthodontist (Grow Dental) – >30 UK members (>100% growth)
2. MiSmile GP Network – 40 UK members (+107% growth), extend to other EU
3. Clearbraces – 8 GP practices in Ireland (>1200 cases/year)

New Doctor Training – External EUMA

Internal New Trained

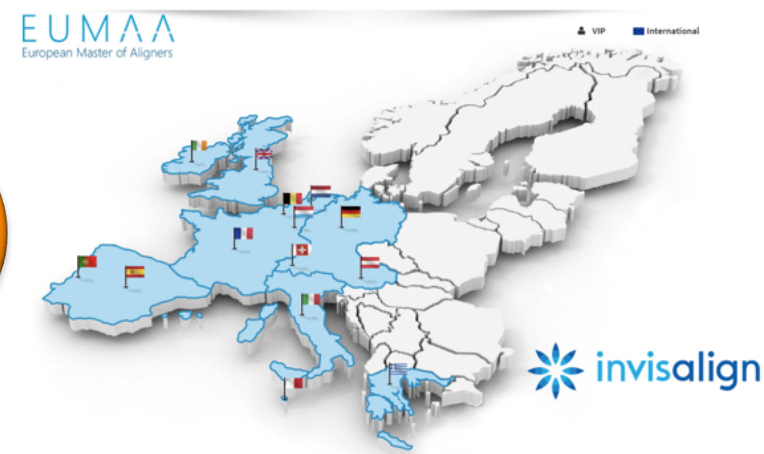
New Doctor Activation – 50%

External New Trained - Spanish Pilot

New Doctor Activation - 80%

3X

More Effective



Core 5 EUMAA – will train 500 customers/year

Global Strategic Priorities – GP Treat & Refer

International Expansion

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GP Dentists Treat & Refer

Patient Demand & Conversion

GP Treat & Refer

New Invisalign Go for General Dentists

- 370,000 GP's
- UK is the only significant GP market (50% EMEA GP business)
- 80% patients learn about teeth straightening from their GP
- Launch Invisalign Go in Q4 2016 in Core EU, currently piloting in Germany
- Target High volume of GP's, performing low volume of cases

New Invisalign Go for General Dentists

EASY

Lean
Rx & ClinCheck

SAFE

(Photo-based)
Progress Assessment

SUCCESSFUL

Photo-based
Case Assessment,
incl. referral routing

PROFITABLE

Pricing Strategy
$1,100

Dedicated Education
& Support

SUPPORTED

Global Strategic Priorities –
Patient Demand and Conversion

International Expansion

Ortho Utilization

GP Dentists Treat & Refer

Patient Demand & Conversion

Patient Demand & Conversion

- Historical focus on creating awareness
- Focus moved to conversion
  - Active DocLoc practice marketing tools
  - Retail concept

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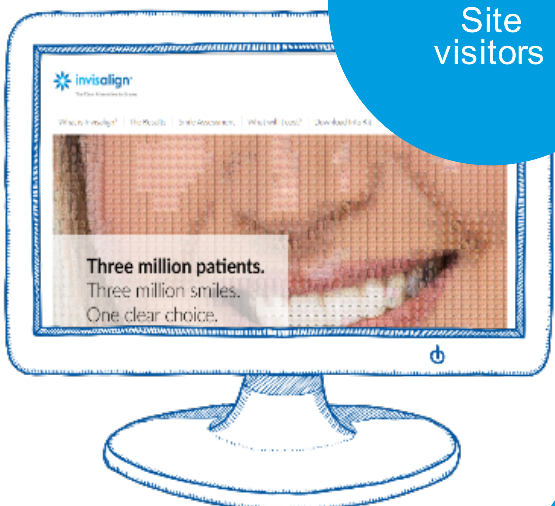
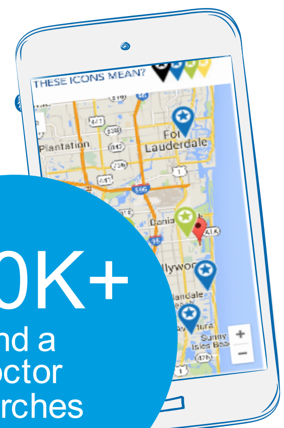
2015 Consumer Marketing Highlights in EMEA



2M+
Site visitors

200K
Social media "likes"



600K+
Find a doctor searches

35K+
Smile Assessments

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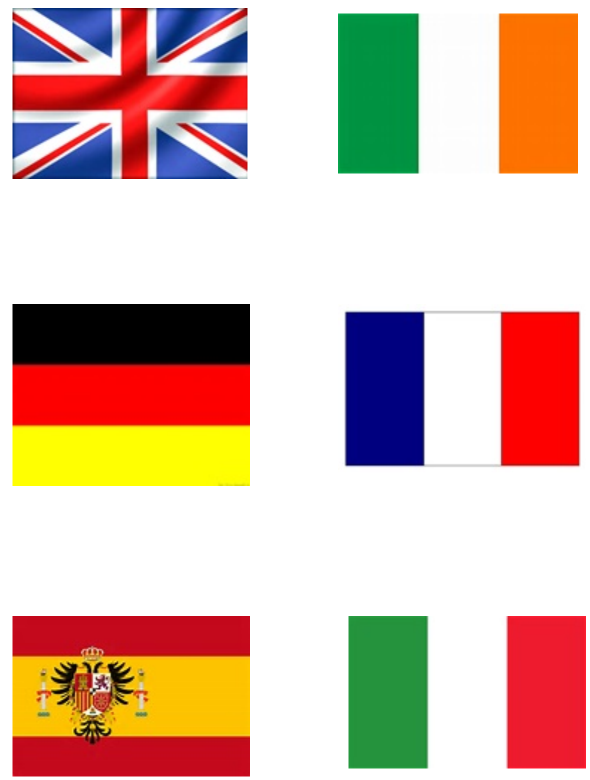
EMEA Consumer Marketing Restrictions

Advertising to consumers:

- Group 1 UK & Ireland
  - Align and doctors are permitted.

- Group 2 France & Germany
  - Only Align permitted.
  - Doctors are NOT permitted.

- Group 3 Italy & Spain
  - Align and doctors are NOT permitted.



EMEA Consumer Campaigns

UK/Ireland

France/Germany

Italy/Spain

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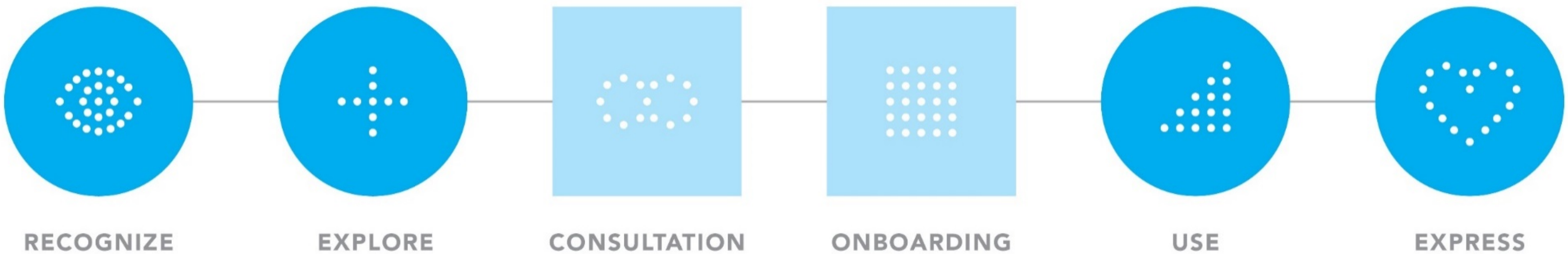
2016 EMEA Consumer Strategy

- Drive Patient Demand and Conversion
- Achieve by ensuring Invisalign is promoted at each phase of the consumer purchase path
- Patient Journey:



Accelerating Growth

By 2020 Our EMEA Business Will…

- Drive NPS beyond 50
- Become >30% WW revenue
- Rapidly develop our commercial focus and execution
- Expand our infrastructure and geographical coverage
- Build a strong presence in the GP channel

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iTero®