

align



invisalign®

iTero®

Sustained Market Leadership and Expansion

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/ **New York, May 23, 2018**

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 2018 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.

The background is a composite of two city street scenes. The left side shows a busy pedestrian walkway at night, illuminated by vibrant neon signs in Chinese and English, including 'BAC', 'ION', and 'McDonald's'. The right side shows a wide city street during the day with tall buildings, traffic, and pedestrians crossing a crosswalk. A large white diamond is centered over the image, containing the text '12M' and 'Total Served Market'.

12M

Total Served
Market

300

MILLION





21
YEARS

BRAND
80%
Awareness

EXPERIENCE
5.5M
Patients

**FULLY
DIGITIZED
SYSTEM**

Unique Foundations

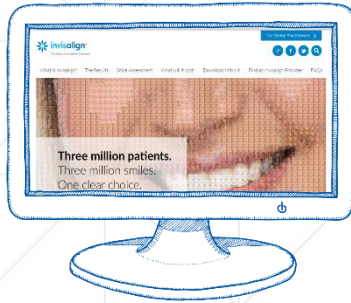
The image is a collage of four photographs, each overlaid with a semi-transparent colored triangle containing text. The top-left triangle is dark blue and contains the text 'Unique Foundations'. The top-right triangle is teal and contains the text 'Brand Appeal'. The bottom-left triangle is green and contains the text 'Financially Attractive'. The bottom-right triangle is teal and contains the text 'Technical & Clinical Proficiency'. The photographs show a smiling couple, a man with a beard, a hand holding a smartphone, and a hand holding a pen over a document.

Brand
Appeal

Financially
Attractive

Technical
& Clinical
Proficiency

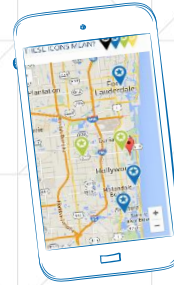
Turning More Consumers Into Patients for Invisalign Doctors



15M+
Website
Visitors



600K+
Smile
Assessments



1.8M+
Doc Locator
Searches



745K+
Social
Media Fans

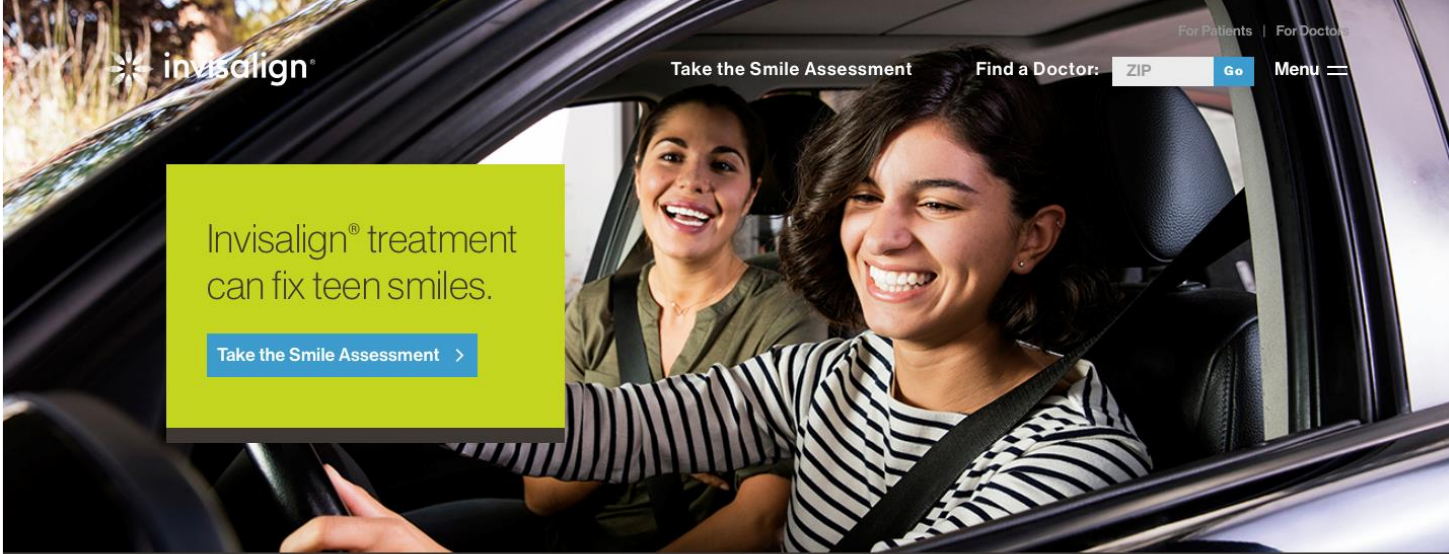
Connecting People to Their Smiles



We believe
a better smile
has the power
to create a
better future,
so we create
technology to
help people
move forward
in life.

 **invisalign®** | made to move

Reaching Out to Teens



The screenshot shows the Invisalign website with a background image of two young women smiling in a car. The Invisalign logo is in the top left. Navigation links for 'Take the Smile Assessment', 'Find a Doctor', and 'Menu' are at the top. A search bar with 'ZIP' and a 'Go' button is next to 'Find a Doctor'. A yellow callout box contains the text 'Invisalign® treatment can fix teen smiles.' and a blue button that says 'Take the Smile Assessment >'. At the bottom, a dark grey banner contains the text: 'Proven effective in shaping teen smiles, up to 2x faster¹. Give your teen a teeth straightening system that is as technologically advanced as they are.'

invisalign®

Take the Smile Assessment

Find a Doctor: ZIP Go Menu

For Patients | For Doctors

Invisalign® treatment can fix teen smiles.

Take the Smile Assessment >

Proven effective in shaping teen smiles, up to 2x faster¹. Give your teen a teeth straightening system that is as technologically advanced as they are.

Global TAM for Clear Aligners is Expanding

12M Ortho Cases

TOTAL AVAILABLE MARKET

3.6M Cases

NON-APPLICABLE

70%

Invisalign Applicability

70%

8.4M Cases

SERVED AVAILABLE MARKET

10%

Currently 10% share of SAM

12M Ortho TAM

75% teenagers (9M)

25% adults (3M)

8.4M SAM

75% teenagers (6.3M)

25% adults (2.1M)

Align Share

4% teenagers

30% adults

Fully Integrated End-to-End Digital Workflow

Digital Patient Data



Digital Analysis & Diagnosis



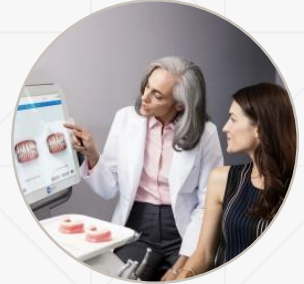
Digital Treatment Planning



Digital Orthodontic Appliances



Digital Doctor/Patient Experience



We are Market Leaders in our Categories

Digital Patient Data



#1

Digital Analysis & Diagnosis



#1

Digital Treatment Planning



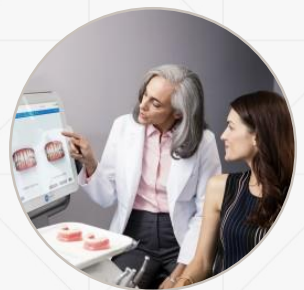
#1

Digital Orthodontic Appliances



#1

Digital Doctor/Patient Experience

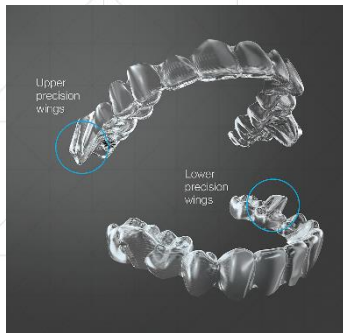


#1

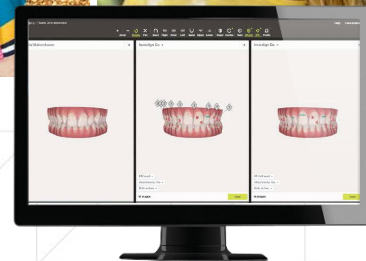
Continuous Innovation Increases Applicability and Drives Adoption of Invisalign



iTero Element 2
High Performance



iTero Element Flex
Transportability



invisalign® go

Designed for Dentists.



align

21

YEARS AHEAD

Clinical Efficacy
Digital Workflow
Brand Appeal

A light gray world map is centered in the background. Overlaid on the map is a large green diamond shape, which serves as a frame for the central text. The diamond is formed by two intersecting green lines.

10%

SHARE

of an **EXPANDING** market

300
MILLION

3 in 4



PEOPLE

need some tooth
movement treatment

1 in 5



PEOPLE

follow through
with the treatment



Transforming the Industry AGAIN

Societal
Changes

Industry
Changes

align

Expertise
and Digital
Innovation

Leveraging the Digital Evolution

Mobile

Convenience

Experience

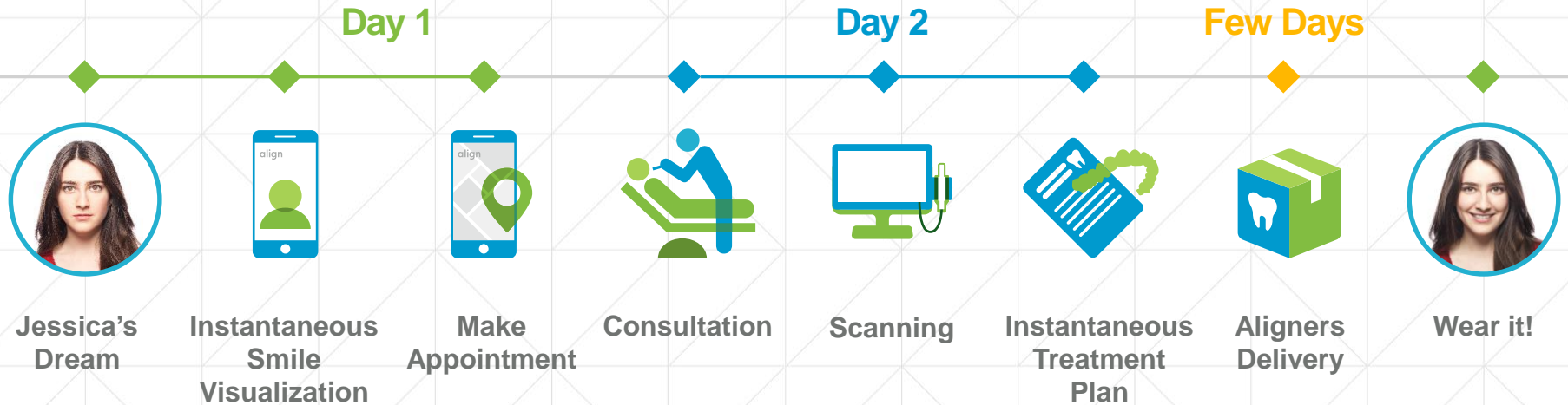


Societal Changes

Smiles on Display
Instant Gratification
Access

Our Digital Future

See It, Scan It, Plan It, Wear It



Connecting More Patients With Doctors

Smile Concierge Program

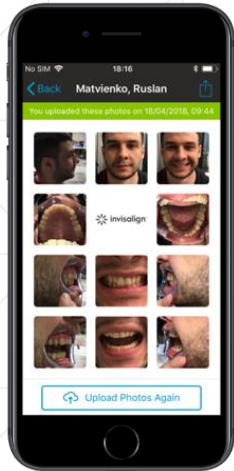
Let a Smile Concierge help you get started.

 **invisalign**® | made to move

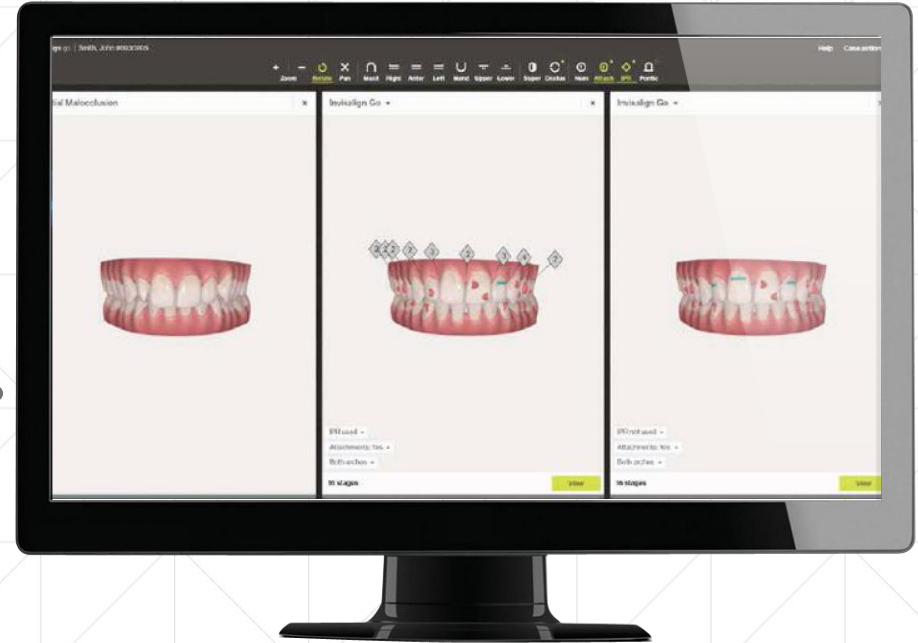
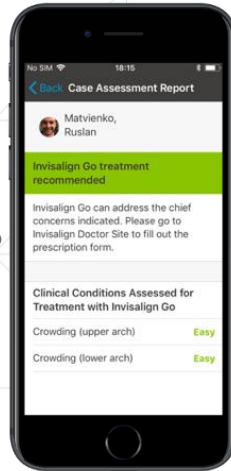


**Invisalign
Store Pilots**

Relevance and Efficiency for General Dentists



Typical
Results
<30
Seconds



Seeing is
Believing



Shared Vision
with Doctors

1 in 5

align



PEOPLE

follow through
with the treatment

5 in 5

align



PEOPLE

get access to the
smile they want

300

MILLION



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