

Quarterly Financial Results

Q3 2011

Align Technology, Inc.



Align Technology Q3 FY2011 Conference Call

- **Speakers:**

- Tom Prescott, president and CEO
- Ken Arola, vice president of finance and CFO

- **Moderator:**

- Shirley Stacy, senior director, corporate and investor communications

- **Replay and Web cast Archive**

- Telephone replay will be available through 5:30pm ET November 10, 2011
 - Domestic callers: 877-660-6853
 - International callers: 201-612-7415
 - Account # 292 and conference # 380473
- Audio web cast archive will be available at <http://investor.aligntech.com> for approximately 12 months

Safe Harbor and Forward Looking Statement

This presentation, including financial tables, contains forward-looking statements, including statements regarding certain business metrics for the fourth quarter of 2011, including anticipated revenue, gross margin, operating expense, operating income, earnings per share, case shipments and cash. Forward-looking statements contained in this news release and the tables below relating to expectations about future events or results are based upon information available to Align as of the date hereof. Readers are cautioned that 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 might cause such a difference include, but are not limited to, difficulties predicting customer and consumer purchasing behavior, the willingness and ability of our customers to maintain and/or increase utilization in sufficient numbers, the possibility that the development and release of new products does not proceed in accordance with the anticipated timeline, the possibility that the market for the sale of these new products may not develop as expected, the risks relating to Align's ability to sustain or increase profitability or revenue growth in future periods while controlling expenses, growth related risks, including capacity constraints and pressure on our internal systems and personnel, our ability to successfully achieve the anticipated benefits from the acquisition of Cadent, continued customer demand for our existing and new products, changes in consumer spending habits as a result of, among other things, prevailing economic conditions, levels of employment, salaries and wages and consumer confidence, the timing of case submissions from our doctors within a quarter, acceptance of our products by consumers and dental professionals, foreign operational, political and other risks relating to Align's international manufacturing operations, Align's ability to protect its intellectual property rights, continued compliance with regulatory requirements, competition from existing and new competitors, Align's ability to develop and successfully introduce new products and product enhancements, and the loss of key personnel. These and other risks are detailed from time to time in Align's periodic reports filed with the Securities and Exchange Commission, including, but not limited to, its Annual Report on Form 10-K for the fiscal year ended December 31, 2010, which was filed with the Securities and Exchange Commission on February 26, 2011. Align undertakes no obligation to revise or update publicly any forward-looking statements for any reason.

Q3 FY2011 Overview

Tom Prescott
President and CEO

Q3 FY2011 Financial Highlights

- Better than expected results were driven by increased Invisalign case volume from N.A. Orthodontists and International doctors, as well as higher earnings that benefited from lower than projected operating expenses
- Strong growth of Invisalign Teen across all customer channels despite normal summer seasonality in core Europe and North American GP offices
- Results also reflect a full quarter of sales from our intra-oral scanner and CAD/CAM services products, which continued to benefit from our sales and marketing resources
- Revenues \$125.9M -- +4.8% Q/Q*, +31.2% Y/Y
- Invisalign record revenues of \$114.3M -- +0.6% Q/Q, +19.1% Y/Y
 - Invisalign record 79,360 case shipments -- +4.4% Q/Q, +19.8% Y/Y
- Scanner and CAD/CAM Services revenues of \$11.6M
 - Scanner revenues \$5.4M, CAD/CAM Services \$6.2M

**Q2 11 only includes 2 months of Scanner and CAD/CAM Services*

Q3 FY2011 Invisalign Geographic Performance

- **N.A. Orthodontists: Record Invisalign Shipments -- +5.4% Q/Q, +29.9% Y/Y**
 - Continued demand for Invisalign Teen drove growth, which includes the peak of the summer season for teen orthodontic case starts.
- **N.A. GP Dentists: Record Invisalign Shipments -- +1.3% Q/Q, +15.9% Y/Y**
 - Increase primarily reflects continued expansion of our GP customer base as well as increased utilization of Invisalign Assist.
 - Invisalign Teen cases increased sequentially among GPs as some may have used the Invisalign Teen product more this quarter in order to receive a free Vivera retainer subscription as part of a Q3 promotion.
- **International Doctors: Record Invisalign Shipments -- +8.2% Q/Q, +11.8% Y/Y**
 - Within core Europe, Invisalign case volume exceeded expectations, notwithstanding normal Q3 seasonality in countries such as Italy, Spain and France, as doctors and their patients took summer holidays. While we typically expect seasonality in the southern part of Europe, we believe that there was also softness in Italy and Spain related to a more challenging economic environment.
 - Some progress in the U.K. this quarter which grew sequentially from Q2, but was still down year over year. Brought on a new U.K. country manager and we're starting to see early impact from recently added sales coverage. Still more work to do as we continue to focus our efforts on restaging growth in the U.K. -- and are confident we can make that happen.
 - Germany had good sequential case growth, including Invisalign Teen, albeit off of a small teen base.
 - Strong growth from the Asia Pacific region, which continues to outpace the rest of the international business. We had good growth in Japan this quarter, one of our direct geographies, and our APAC distributor continues to deliver successful growth in a number of smaller Asian country markets, particularly in Hong Kong, Australia, Singapore and Taiwan.

Q3 FY2011 Invisalign Adoption Metrics

Doctor Utilization and Training

- Total utilization was unchanged at 4.0 cases per doctor

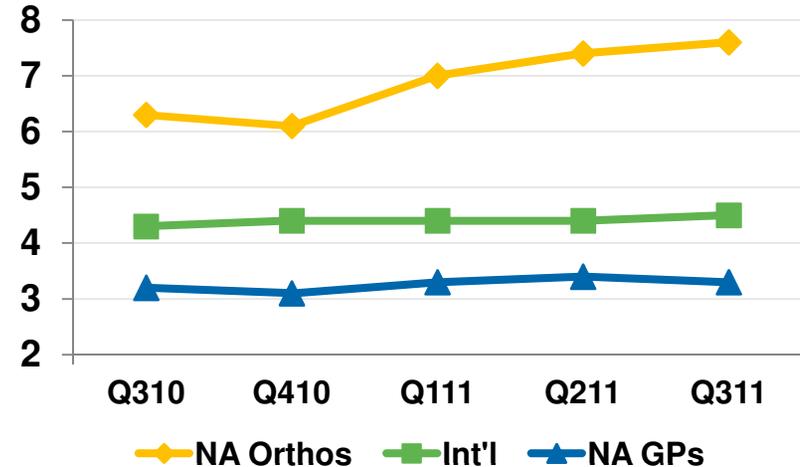
- N.A. Orthodontists 7.1 cases/doc
+3% Q/Q, +22% Y/Y
- N.A. GP Dentists 2.8 cases/doc
-2% Q/Q, +5% Y/Y
- International 4.0 cases/doc
+0.4% Q/Q, +3% Y/Y

- 1,585 new Invisalign-trained doctors

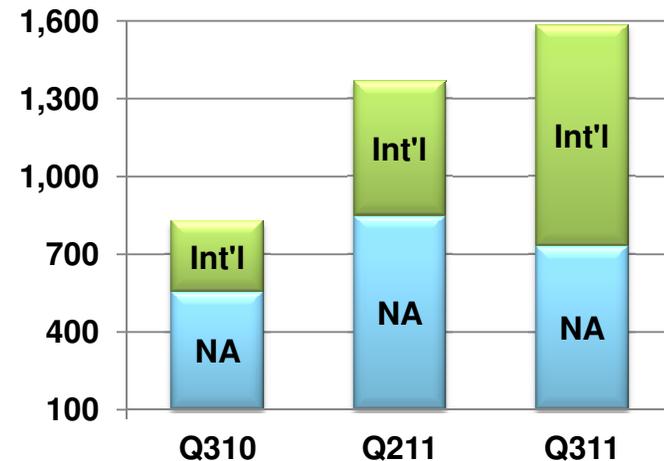
- 730 trained in North America
- 855 trained in International, reflects increased training activity by our international distributors following the international launch of Invisalign G3 in May

Utilization = # of cases shipped/# of doctors to whom cases were shipped

Average Channel Utilization



Quarterly Doctors Trained Worldwide



Strategy to Drive Adoption of Invisalign

- Accelerate product and clinical innovation, which includes new products along with significant evolution in new features and functionality
- Enhance the customer experience, through evolutions in customer facing systems
- Increasing the effectiveness of consumer demand creation and extending the Invisalign brand
- Drive International growth, principally in Europe, while opening up additional new markets around the world

Product and Clinical Innovation

Invisalign^{G4} Available Worldwide Starting Nov 14, 2011



- Invisalign G4, the next generation of SmartForce clinical innovations engineered to deliver even better clinical results.
- Invisalign G4 SmartForce predictability features are designed to give:
 - Greater root tip control for canines and upper centrals
 - Improved predictability for upper laterals
 - Better clinical outcomes for anterior open bite treatment
- Invisalign G4 was announced on October 7th. Held an “Ask the Expert” webinar with more than 3,200 of our customers participating
 - 95% of webinar participants surveyed said they have more confidence in Invisalign as a result of the new features
 - 91% indicated they would be more likely to recommend Invisalign going forward



Product and Clinical Innovation

Q3 11 Teenage Orthodontic Segment

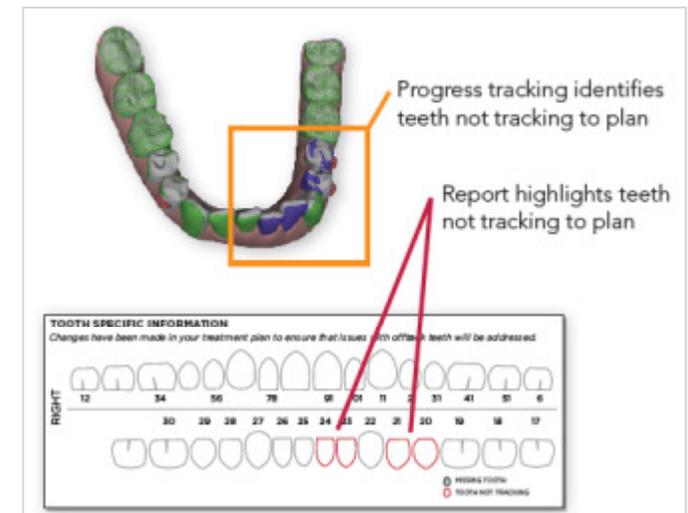
- 20,170 teenage cases or 25% of WW volume
 - +28% Q/Q and +23% Y/Y
 - Sequential growth driven by the Invisalign Teen product
 - Q3 is the peak of the summer season for teen-age orthodontic case starts and over the summer we invested in increased TV advertising and PR/Event Marketing activity in support of the Teen category – all of which contributed to solid growth
- 11,730 Invisalign Teen product cases or 15% of WW volume
 - +36% Q/Q and +54.5% Y/Y
- Total teenage case growth for N.A. Ortho was up by more than 24% over the past 12 months.



Product and Clinical Innovation

Q3 11 Invisalign Assist

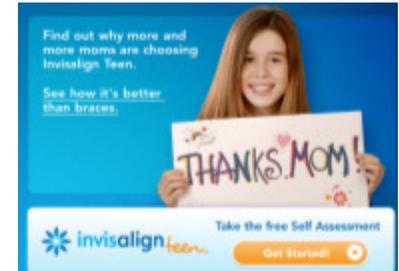
- 5,250 Invisalign Assist cases or 7% of WW volume
 - +5% Q/Q and +33% Y/Y
- Invisalign Assist increases the likelihood of a new doctor becoming a routine user, while helping to increase utilization among lower volume doctors
- As they become more confident in delivering great results for their patients, they use Invisalign more regularly and on more complex cases.
- Over the past year, the mix of cases with progress tracking have increased. This means that Assist users are tackling more difficult cases.
 - Cases with progress tracking means aligners are shipped in “batches” as the case progresses rather than shipping all of the aligners up front



Consumer Demand Creation

Q3 11 Program Highlights

- Goal to raise awareness of Invisalign and Invisalign Teen as the best option for a healthy, beautiful smile among adults and teens.
- Traditional Media and Public Relations
 - Had a strong national TV presence with our “Twins” advertising spot running during July and August on teen and mom-focused cable channels. In September, we ramped up our national TV advertising targeting adults with spots running on cable and major network channels.
 - Invisalign Teen was featured on more than a dozen TV morning news shows as part of a back to school satellite media tour, reaching more than 3 million parents nationwide.
- Digital and Social Media
 - Continue to focus on building valuable testimonials and social media content through the Invisalign Teen Mom Advisory Board and blogger events that reach thousands of moms on behalf of Invisalign Teen.
- PR and Event Marketing
 - US Open of Surfing, which exposed the Invisalign brand and local doctors to more than 400,000 consumers over 4 days at this annual surf and action sports event in August.
 - September marked the kick-off of Radio Disney’s “Next Big Thing” Tour powered by Invisalign Teen. Tour will visit 8 top markets with an Invisalign-sponsored stage show and branded activities in each city designed to help engage parents and kids with local doctors and the Invisalign brand.



Q3 11 International Update



- Revenue of \$30.9M
 - +6% Q/Q* and +33% Y/Y to 25% of WW revenues
- Invisalign case shipments of 18,170
 - +8% Q/Q and +12% Y/Y to 23% of WW volume
- Steady progress in China with commercialization efforts focused on key opinion leaders in core cities
 - Invisalign case volume increased nicely in Q3, albeit off a very small base and included initial cases from several key opinion leaders from the top public universities and hospitals in China.
 - Also saw broader and more frequent use of Invisalign by a small core group of leading private orthodontists.
- Good progress outside of core Europe in the EMEA region
 - EMEA Distributor launched new marketing programs and clinical support programs throughout the EMEA region. Participated in the Orthodontic Congress in Turkey. Began preparing for commercial availability in the Middle East with the first Invisalign training course in Dubai, October 30.
 - Expect to receive regulatory approval in Russia by the end of the year and shortly after approval, we'll hold our first Invisalign training courses in Moscow with 150 of the top Orthodontists in Russia.

**Q2 11 only includes 2 months of Scanner and CAD/CAM Services*

Scanner and CAD/CAM Services

Q3 11 Performance

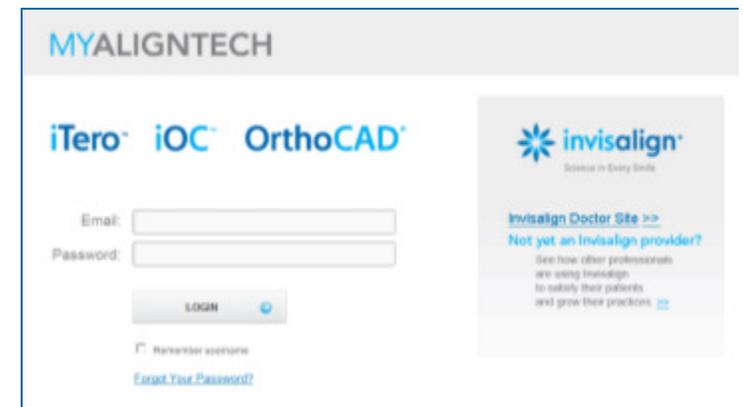
- Scanner and CAD/CAM Services revenues of \$11.6M
 - Scanner revenues \$5.4M, CAD/CAM Services \$6.2M
- North America - pleased to see good progress in scanner sales
 - Most of the leads were developed by leveraging key Invisalign events like the GP Summit in July, multiple tradeshows, and a series of Ortho-focused Forums.
 - Having now completed hiring of our new North American scanner sales team, we expect to see some positive effects start to show up over the next few quarters, as this team comes up the learning curve.
- Europe - continue to make progress in building out the sales/services/support model with our partner Straumann.
 - By integrating the Straumann team into major Invisalign events like our International Summit at the end of Q2, we are introducing them to opportunities among our European Orthodontists and GP dentist customers.
 - A lot of good work is going on here to ensure we can scale this business and the Align and Straumann teams are working on plans to generate growth.



Scanner and CAD/CAM Services

Q3 11 Progress and Milestones

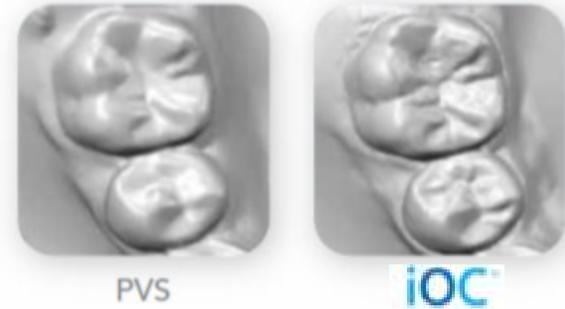
- Updated and better integrated the scanner and CAD/CAM services products and brands to be more consistent with the Invisalign branding approach.
- Began a phased rollout of the iTero 4.0 Real Time Modeling (RTM) upgrade
 - First phase includes the new 4.0 user interface, RTM scanning protocol and other key software features. These users will also have improved digital workflows for both Straumann® and Biomet 3i® fixture level implant integrations with new detailed implant prescription options.
 - Second phase will include Invisalign interoperability and will be available by year-end.
- Commitment to an open architecture platform in September with the launch of STL Export for both the iTero and iOC scanners
 - Doctors may now export generic STL files directly from their MyAlignntech account for integration with third-party CAD/CAM services such as cone beam CT imaging, implant and orthodontic treatment planning services, and digital laboratory services.
 - Open approach provides maximum flexibility for our customers and the labs and suppliers they choose.



Scanner and CAD/CAM Services

Q3 11 Progress and Milestones

- Recall that in May, we released iOC 4.0 with Invisalign interoperability
 - Have seen digital case submissions begin to replace traditional PVS submissions among those practices. In addition to shorter cycle times for those practices, we are seeing higher quality data



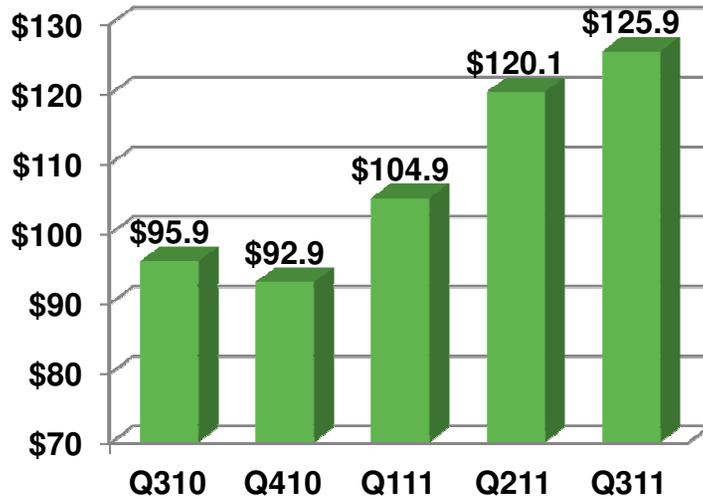
- iTero scanner receive the 2011 Pride “Best of Class” Technology Award in the Clinical/Diagnostic category for digital impressions at ADA conference.
- We are committed to build on this progress and become the leader in the intra-oral scanner market. As we grow our installed base over the coming quarters, we will describe our broader strategy for the restorative market in greater detail.

Q3 FY2011 Financial Review

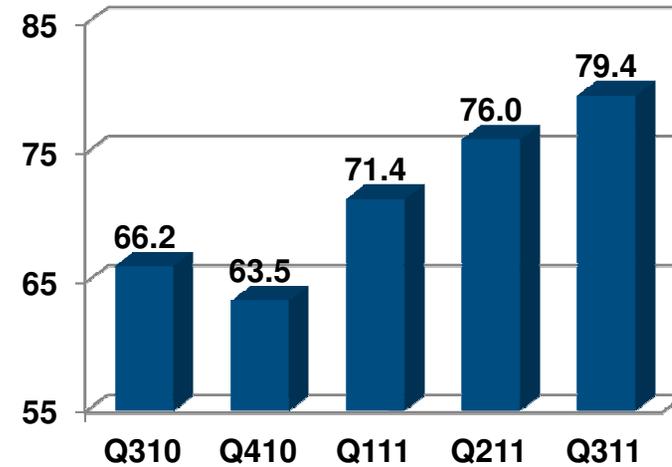
Ken Arola
Vice President, Finance and CFO

Q3 FY2011 Trended Financials

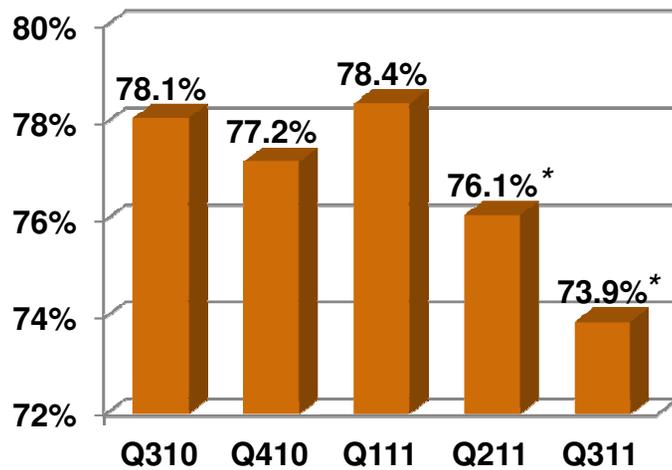
WW Net Revenue (\$M)



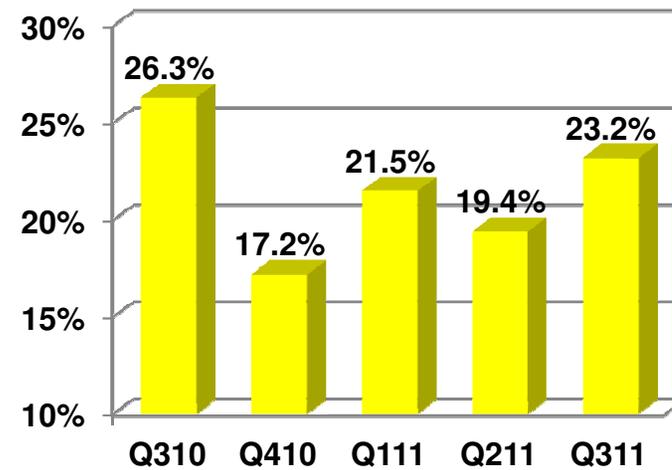
Invisalign Case Shipments (#K)



Gross Margin %



Operating Margin % *



* Non-GAAP

Q2 11 only includes 2 months of Scanner and CAD/CAM Services

A reconciliation of GAAP to Non-GAAP can be found at <http://investor.aligntech.com> under Financial Information > Quarterly Results for each respective quarter.

Q3 FY2011 Revenue and Cases by Channel

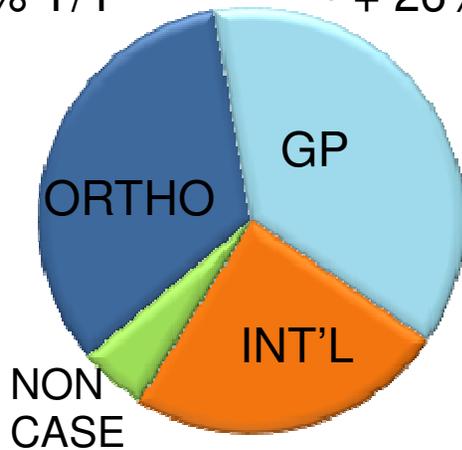
Q3 11 Revenue: \$125.9M

N.A. Ortho: 34%

- + 7% Q/Q
- + 37% Y/Y

N.A. GP: 37%

- + 2% Q/Q
- + 26% Y/Y



Invisalign

Non-case: 5%

- + 4% Q/Q
- + 31% Y/Y

Int'l: 24%

- + 6% Q/Q
- + 33% Y/Y

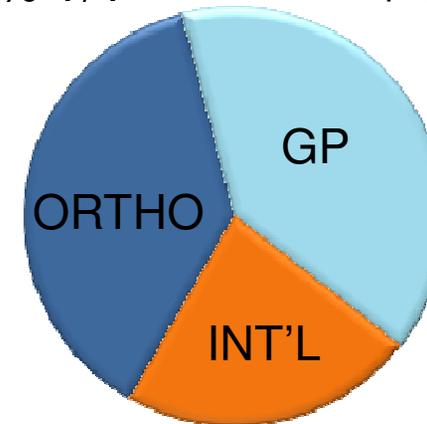
Q3 11 Invisalign Case Shipments: 79,360

N.A. Ortho: 38%

- + 5% Q/Q
- + 30% Y/Y

N.A. GP: 39%

- + 1% Q/Q
- + 16% Y/Y



Int'l: 23%

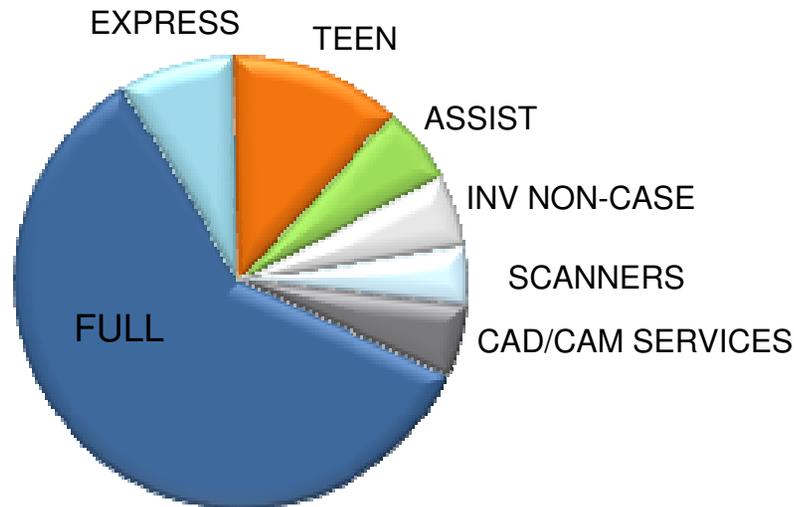
- + 8% Q/Q
- + 12% Y/Y

Q2 11 only includes 2 months of Scanner and CAD/CAM Services

Q3 FY2011 Revenue and Cases by Product

Q3 11 Revenue: \$125.9M

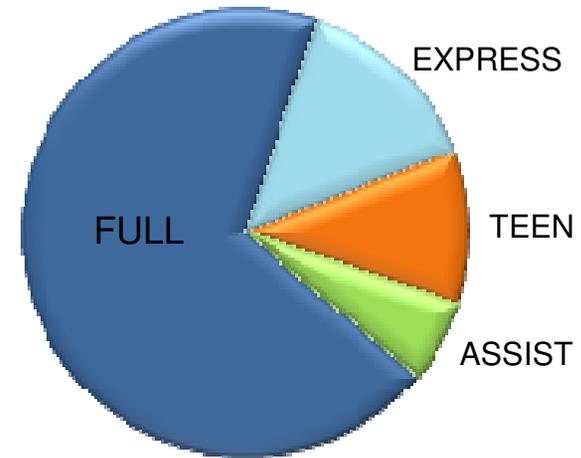
Full: 60%	Express: 8%	Teen: 12%
• - 2% Q/Q	• - 5% Q/Q	• + 20% Q/Q
• + 13% Y/Y	• + 18% Y/Y	• + 36% Y/Y



Assist: 6%	Invisalign Non-case: 5%	Scanner: 4%	C/C Services: 5%
• - 2% Q/Q	• + 4% Q/Q	• + 98% Q/Q	• + 67% Q/Q
• + 62% Y/Y	• + 31% Y/Y		

Q3 11 Invisalign Case Shipments: 79,360

Full: 65%	Express: 14%
• + 0.5% Q/Q	• - 3% Q/Q
• + 14% Y/Y	• + 13% Y/Y



Teen: 15%	Assist: 6%
• + 36% Q/Q	• + 5% Q/Q
• + 55% Y/Y	• + 33% Y/Y

Q2 11 only includes 2 months of Scanner and CAD/CAM Services

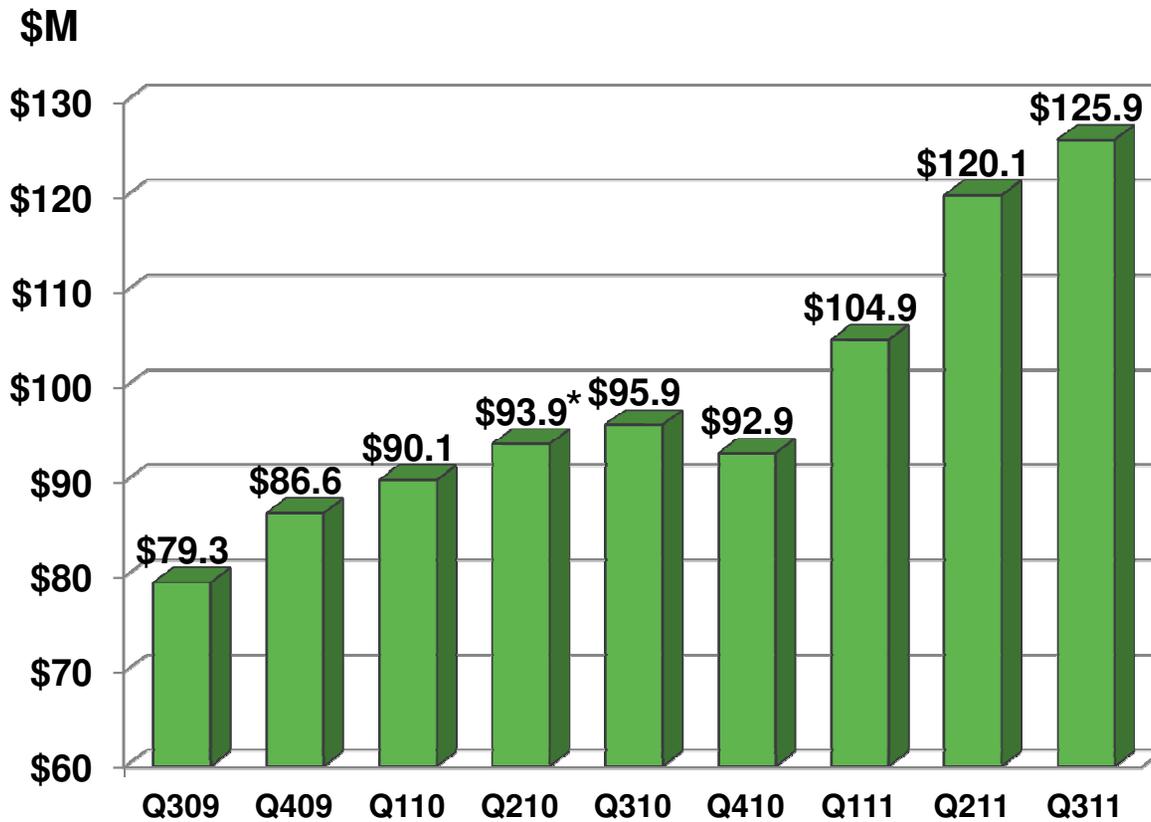
Q3 FY2011 Income Statement Highlights

	Q3 11	Q2 11	Sequential Change	Q3 10	Year/Year Change
Revenue	\$125.9M	\$120.1M	+4.8%	\$95.9M	+31.2%
Gross Margin	73.4%	75.9%	(2.5%) pts	78.1%	(4.7%) pts
Non-GAAP Gross Margin	73.9%	76.1%	(2.2%) pts	78.1%	(4.2%) pts
Operating Expenses	\$66.1M	\$74.5M	(11.4%)	\$53.0M	+24.6%
Non-GAAP Op Exp	\$63.8M	\$68.1M	(6.3%)	\$49.7M	+28.4%
Operating Margin	20.9%	13.8%	+7.1% pts	22.8%	(1.9%) pts
Non-GAAP Op Margin	23.2%	19.4%	+3.8% pts	26.3%	(3.1%) pts
GAAP EPS, diluted	\$0.24	\$0.14	\$0.10	\$0.22	\$0.02
Non-GAAP EPS, diluted	\$0.27	\$0.20	\$0.07	\$0.25	\$0.02

Q2 11 only includes 2 months of Scanner and CAD/CAM Services

A reconciliation of GAAP to Non-GAAP can be found at <http://investor.aligntech.com> under Financial Information > Quarterly Results for each respective quarter.

Revenue Trend



Q3 11 Revenue Highlights

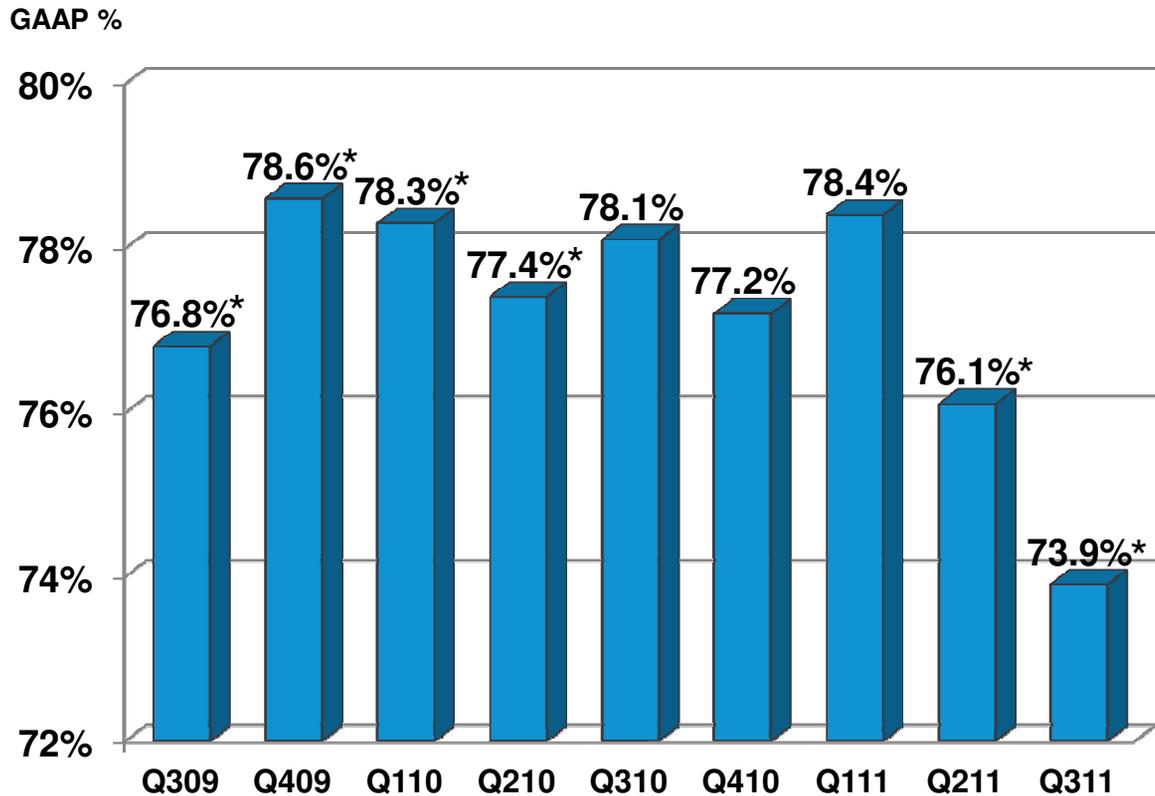
- Revenues of \$125.9M (+4.8% Q/Q, + 31.2% Y/Y)
 - \$114.3M for Invisalign
 - \$11.6M for scanners & CAD/CAM services
- Q/Q increase in Invisalign revenue primarily reflects increased N.A. Ortho and Int'l case volume. This volume growth was partially offset by Int'l ASPs, driven by a higher mix of revenue from distributors and foreign exchange rates. Additionally, in N.A. there were deferrals associated with the Teen/Vivera promotion, and there was an increase in Advantage Rebates.
- Y/Y Invisalign revenue growth was driven primarily by higher volumes across all customer channels and the benefit from favorable foreign exchange rates on international shipments.

* Non-GAAP

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Gross Margin Trend



Q3 11 Gross Margin Highlights

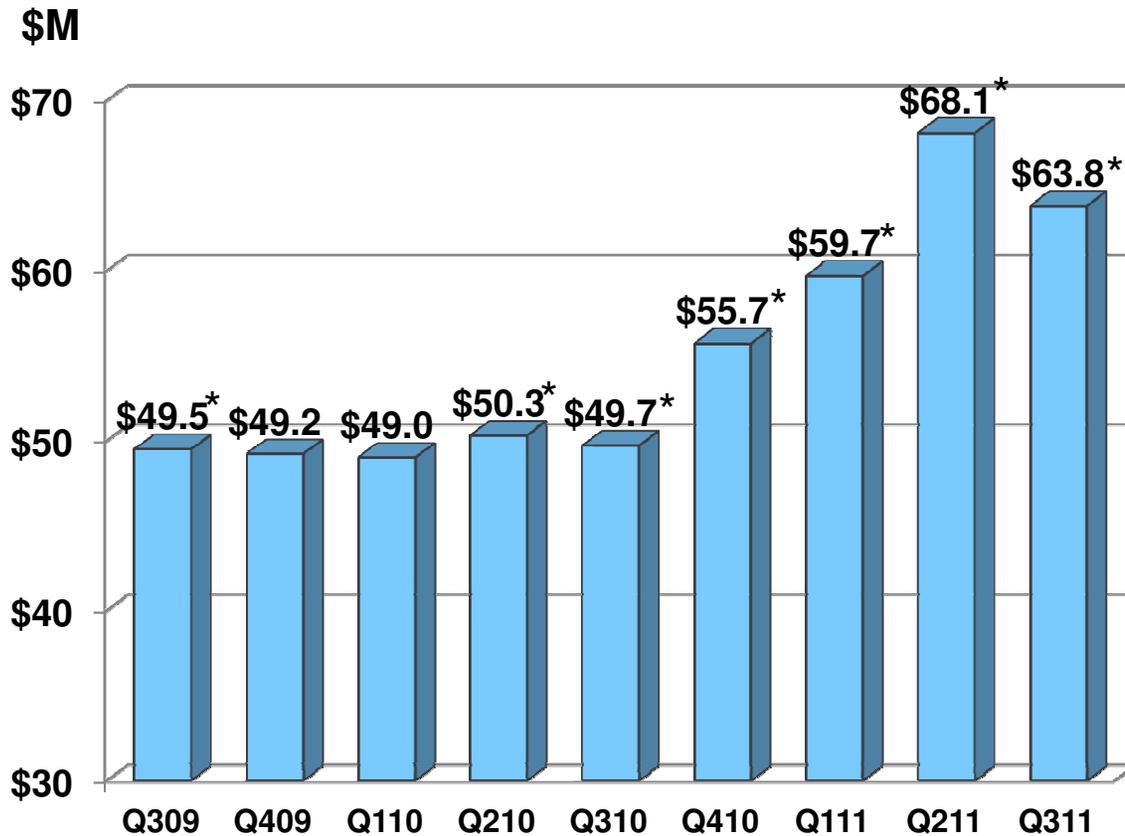
- GAAP gross margin was \$92.4M or 73.4%.
- Non-GAAP gross margin of \$93.0M or 73.9%
 - -2.2% pts Q/Q, -4.2% pts Y/Y
- Q/Q decrease primarily reflects a full quarter of cost of sales from scanners and CAD/CAM services, including costs for Israeli scanner operations that were previously included in operating expense. Additionally, gross margins were impacted by the Teen/Vivera promotion, the Advantage rebate program and international ASPs which were impacted by mix and foreign exchange rates.
- Includes stock based compensation expense of \$0.5M

* Non-GAAP

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Operating Expense Trend



Q3 11 Op Ex Highlights

- Q3 GAAP operating expense was \$66.1M
- Non-GAAP operating expenses were \$63.8M
 - + 6.3% Q/Q, + 28.4% Y/Y
- Q3 non-GAAP operating expense was down \$4.3M sequentially and less than our original outlook. This is primarily due to timing in the ramp of additional N.A. scanner sales force, marketing programs in both N.A. and Int'l which were delayed to Q4, as well as the move of Israeli scanner operations costs from operating expense to cost of sales. As of October, the scanner sales force is complete and the entire team is on board.
- Includes stock-based compensation expense of \$4.5M

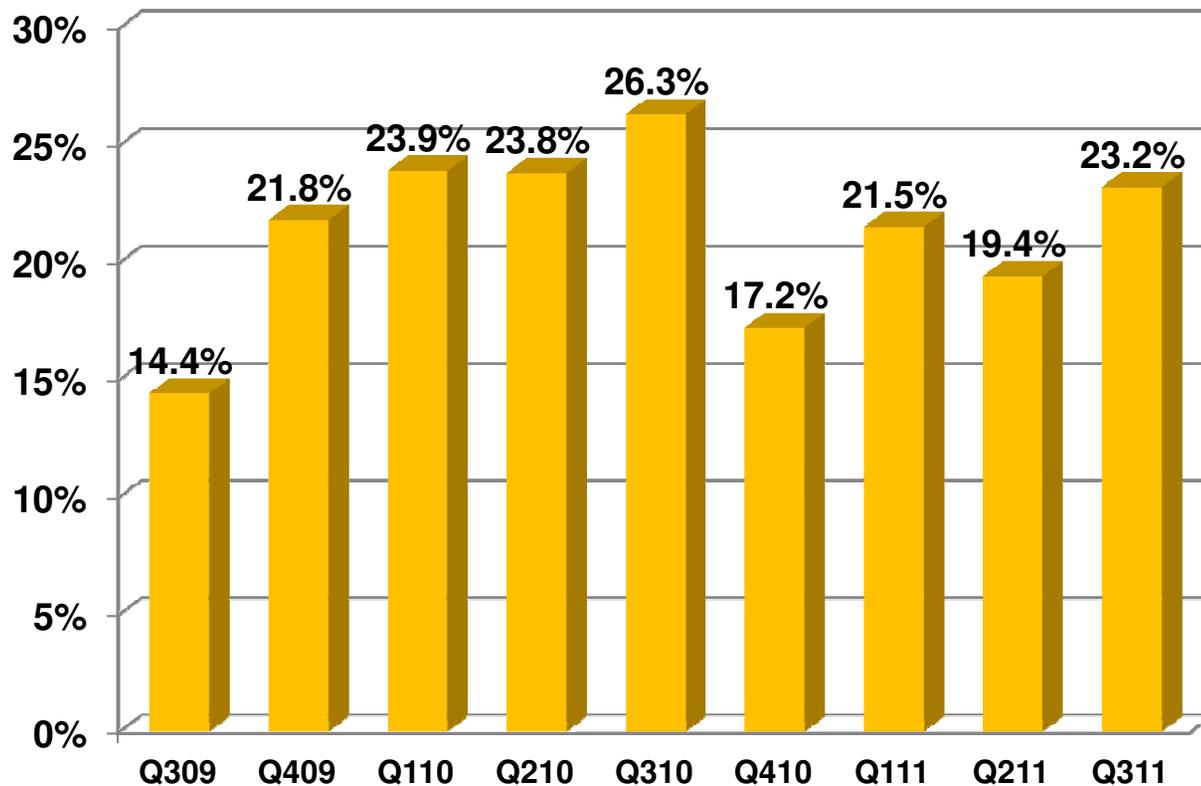
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Operating Margin Trend

Non-GAAP %



Q3 11 Op Margin* Highlights

- Q3 GAAP operating income was \$26.3M
- Non-GAAP Operating Margin 23.2%
 - + 3.8% pts. Q/Q
 - - 3.1% pts. Y/Y
- Q/Q increase in non-GAAP operating margin reflects higher Invisalign volumes and lower than projected operating expenses.

* Non-GAAP

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Balance Sheet Highlights

	Q3 11	Q2 11	Q3 10
Cash, Cash Equivalents, & Marketable Securities	\$211.1M	\$179.5M	\$280.1M
Cash Flow from Operations	\$41.6M	\$29.7M	\$35.8M
DSOs	62 days	62 days	60 days

Q2 11 only includes 2 months of Scanner and CAD/CAM Services

Q2 11 cash, cash equivalents & marketable securities reflects cash paid for the Cadent acquisition

Board Authorizes \$150M Stock Repurchase Program

- Timing and actual number of shares repurchased will depend on a variety of factors including share price, corporate needs, regulatory requirements and other market conditions.
- Our strong balance sheet and healthy cash flow enable the company to continue investing in our strategic growth initiatives while returning excess cash to our shareholders through a share repurchase program. It will also help offset dilution from our employee equity plans.
- Board of directors believes that our stock represents an attractive investment for Align and its investors, and the repurchase program demonstrates the company's ongoing commitment to increasing shareholder value.

Financial Outlook

Factors that Contribute Q4 Outlook

- Q3 is historically the peak season for teenage Orthodontic case starts and we believe we gained share during the quarter across all customer channels. Q4 is historically a slower period for teenage orthodontic case starts and although we believe we will continue to take share, we would expect our teenage cases to reflect normal Q4 seasonality and be down sequentially from Q3 to Q4.
- Since we are not offering the Teen/Vivera promotion in Q4, North America GPs -- and some Orthos -- may not do as many Invisalign Teen cases in Q4.
- While our customers continue to report steady patient traffic in their offices, we are being thoughtful about near-term consumer sentiment and the potential impact on dental visits and high value procedures like Invisalign.
- While we continue to grow nicely outside of core Europe, we're mindful of the challenging economic environment in Europe, especially in the U.K., where we also had some execution issues in Q2. With new leadership in the U.K and expanded sales coverage we expect to restage growth but it will take a few quarters.

Q4 Fiscal 2011 Outlook

Q4 11 Outlook	GAAP	Non-GAAP
Revenue	\$124.0 M – \$128.5 M	
Invisalign Case Shipments	78.0 K – 80.5 K	
Gross Margin	70.9 % – 71.5 %	71.9 % – 72.5 %
Operating Expenses	\$68.9 M – \$70.4 M	\$66.9 M – \$68.4 M
Operating Margin	15.3 % – 16.7 %	17.9 % – 19.2 %
EPS, diluted	\$0.17 – \$0.19	\$0.20 – \$0.22
Effective tax rate	27 %	
Stock based compensation	\$5.0 M	
Diluted shares outstanding	81 M *	
Cash	\$220 M - \$225 M *	

* Excludes any stock repurchase during the quarter

3 to 5 Year Financial Model Targets

	Q3 11 Actual	Q3 10 Actual	3 – 5 Year Model
Revenue CAGR%			15 - 25%
Non-GAAP Gross Margin	73.9%	78.1%	73% - 78%
Non-GAAP Op Ex %	50.7%	51.8%	45% - 50%
Non-GAAP Op Margin	23.2%	26.3%	25% - 30%

**Non-GAAP*

A reconciliation of GAAP to Non-GAAP can be found at <http://investor.aligntech.com>

Q3 FY 2011 Summary

- Very pleased to report another strong quarter of results for our shareholders – both on the financial side as well on a range of key programs and initiatives.
- We are committed to extending our lead in clear aligner therapy, even against the tough competitors in our market and continue to press ahead on key strategic initiatives to maintain momentum.
- We are well along with the integration of Cadent into the Align business and over time, expect to see both market and earnings leverage from putting our two innovative companies together.
- We continue to see great opportunities to build this franchise into a leader in dentistry and the medical device industry, yet are mindful of the challenging economic environment and are committed to run the business prudently. We look forward to continued progress and will report back to you at the end of the year.

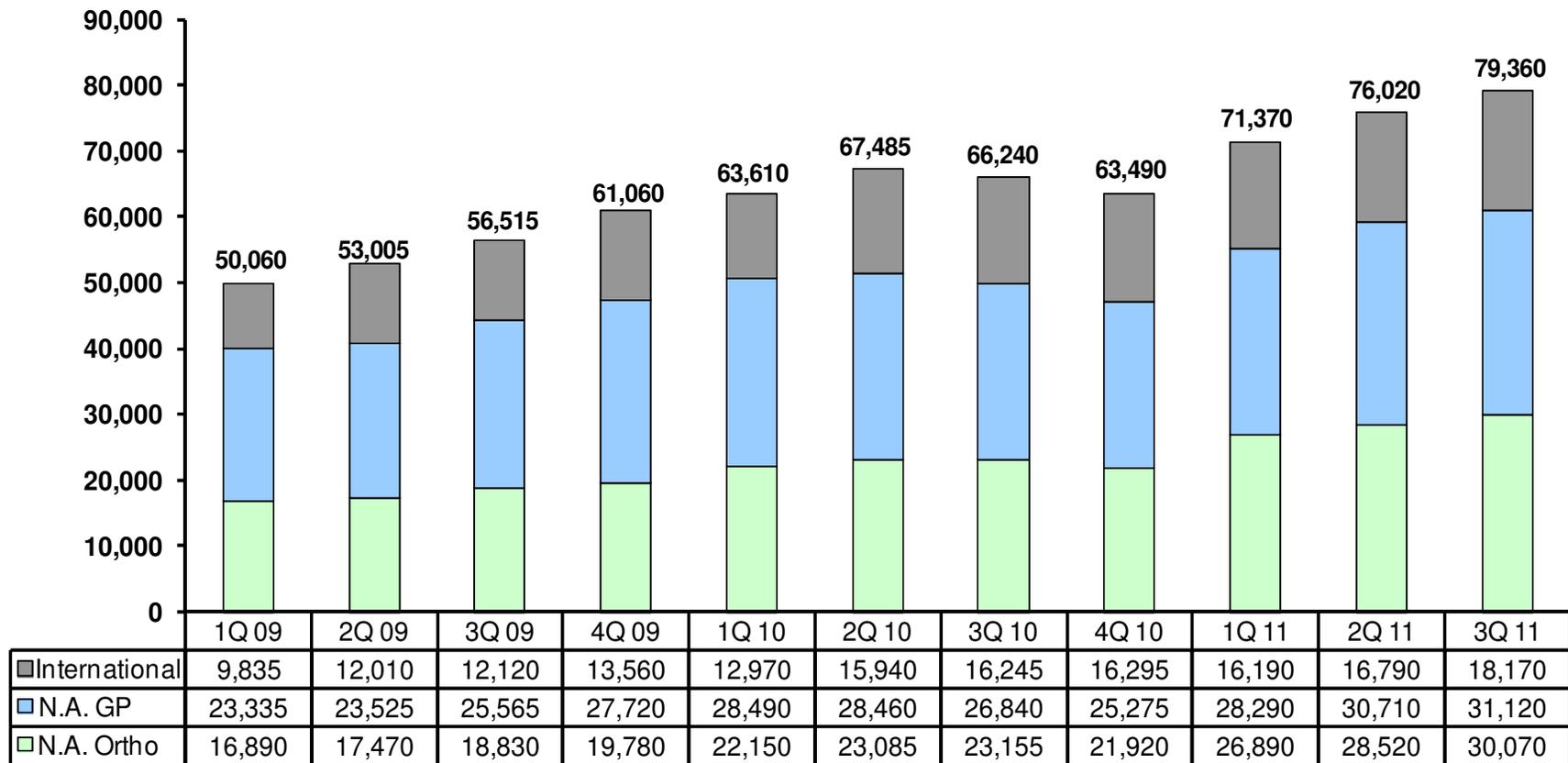
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 - Shirley Stacy, Senior Director, [sstacy@aligntech.com](mailto:ss Stacy@aligntech.com)
 - Yin Cantor, Senior Manager, ycantor@aligntech.com

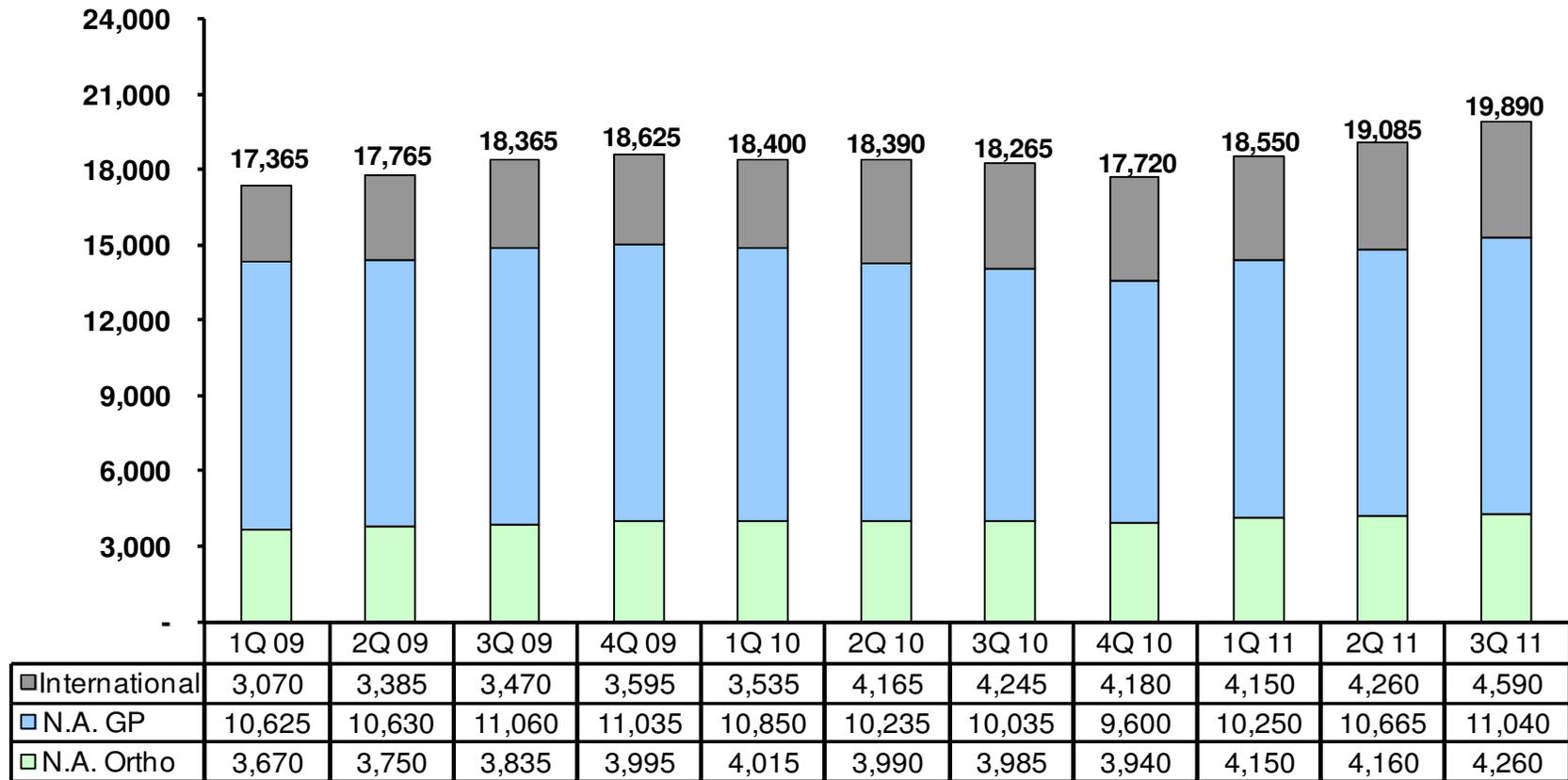
Additional Invisalign Data

Historical Information as of 9/30/11

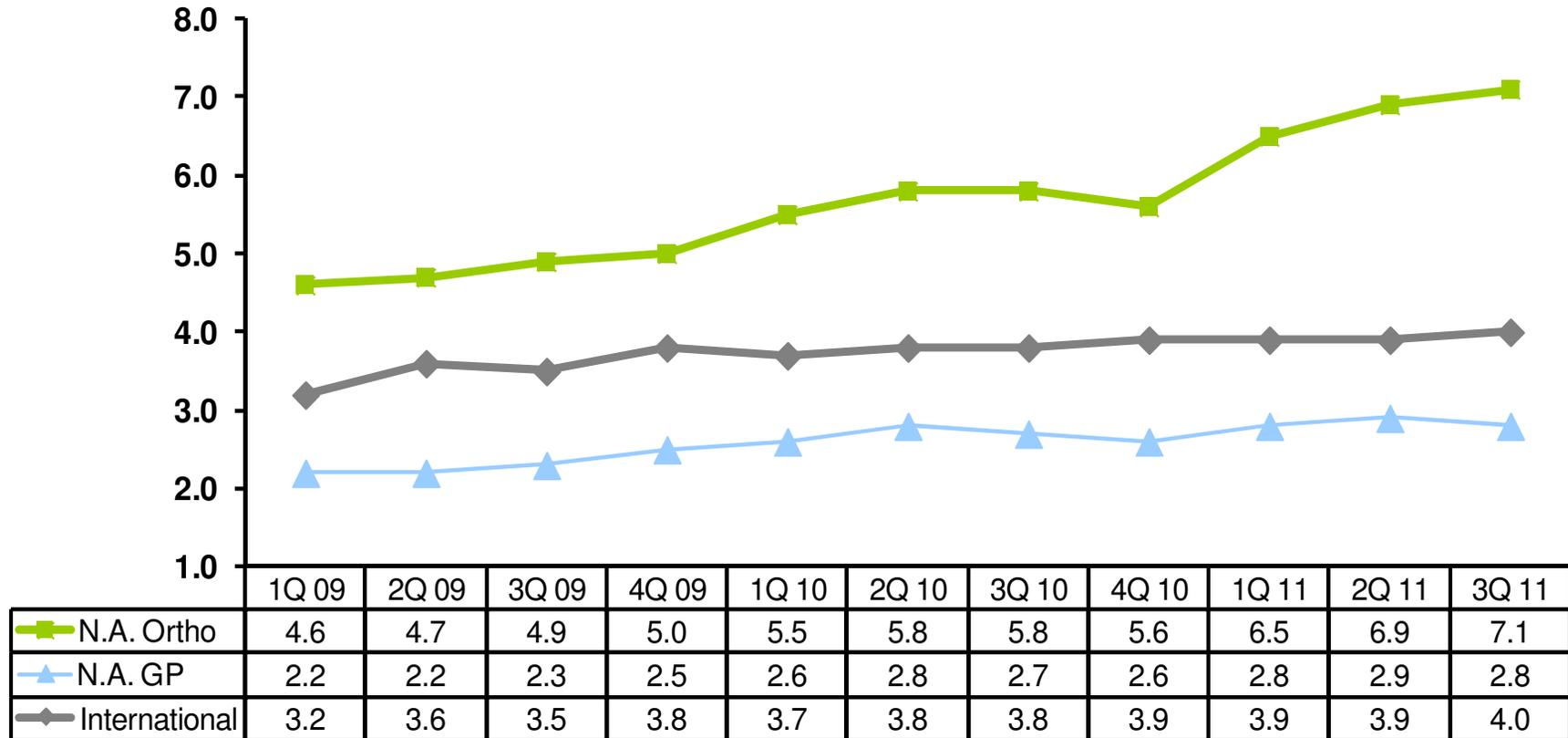
Invisalign Cases Shipped By Channel



Total Doctors Invisalign Cases Shipped To

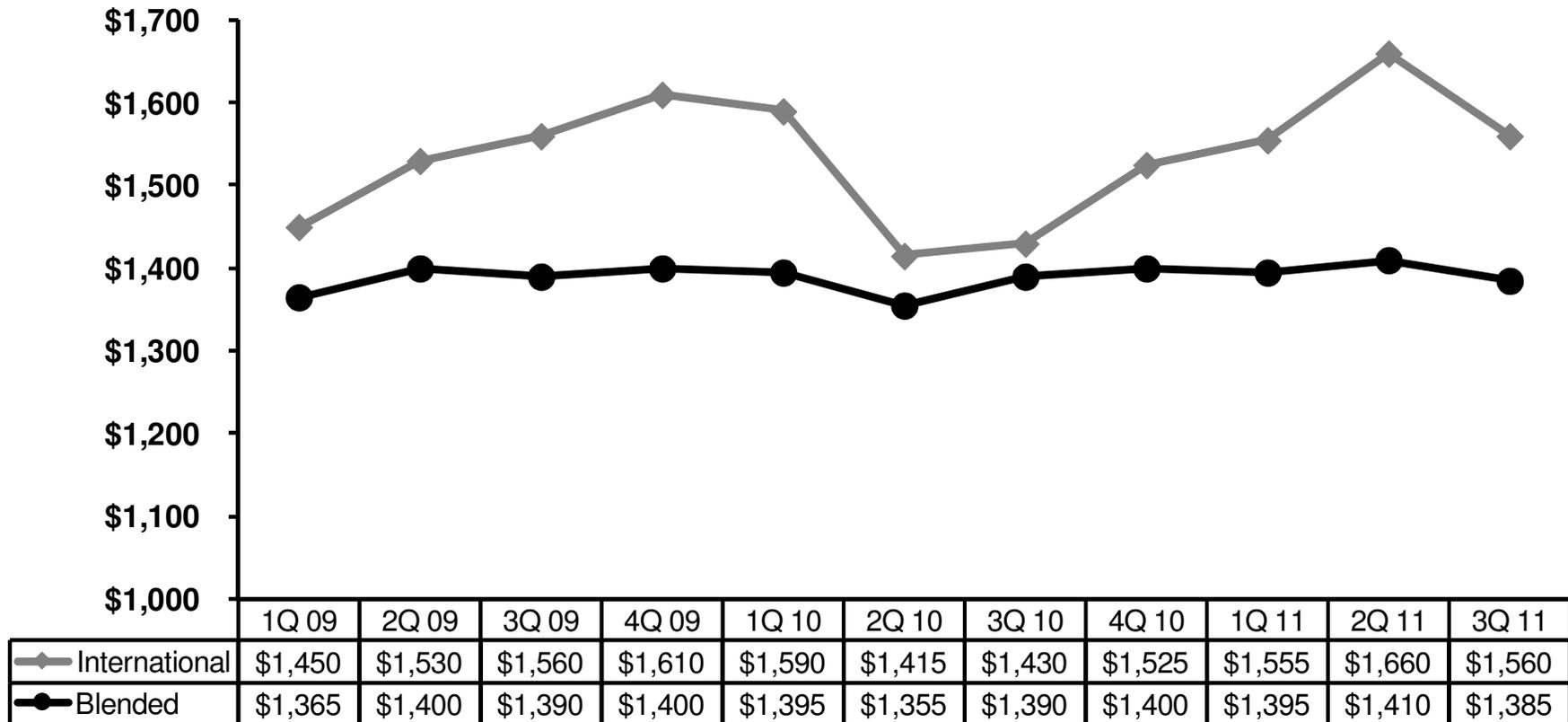


Invisalign Utilization Rate*



*Utilization Rate = # of Cases Shipped / # of Doctors Cases Are Shipped To

Invisalign Average Selling Price (ASP), as billed



* Beginning in Q1 2008, ASPs reflect gross revenue prior to impact from new products deferrals
 Beginning in Q1 2009, blended ASPs do not include Align's retainer business