

align



Sustained Market Leadership and Expansion

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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 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 image is a composite of two photographs of a busy city street, likely Times Square in New York City. The left side shows the street at night, illuminated by vibrant neon signs for brands like BAC, GE, and McDonald's, with a dense crowd of pedestrians. The right side shows the same street during the day, with tall buildings and a clear sky. A white diamond-shaped graphic is centered over the image, containing the text '12M Total Served Market'.

12M

Total Served
Market

300

MILLION





21

YEARS

BRAND

80%

Awareness

EXPERIENCE

5.5M

Patients

**FULLY
DIGITIZED
SYSTEM**

Unique Foundations



Brand
Appeal

Financially
Attractive

Technical
& Clinical
Proficiency

Turning More Consumers Into Patients for Invisalign Doctors



15M+
Website
Visitors



600K+
Smile
Assessments

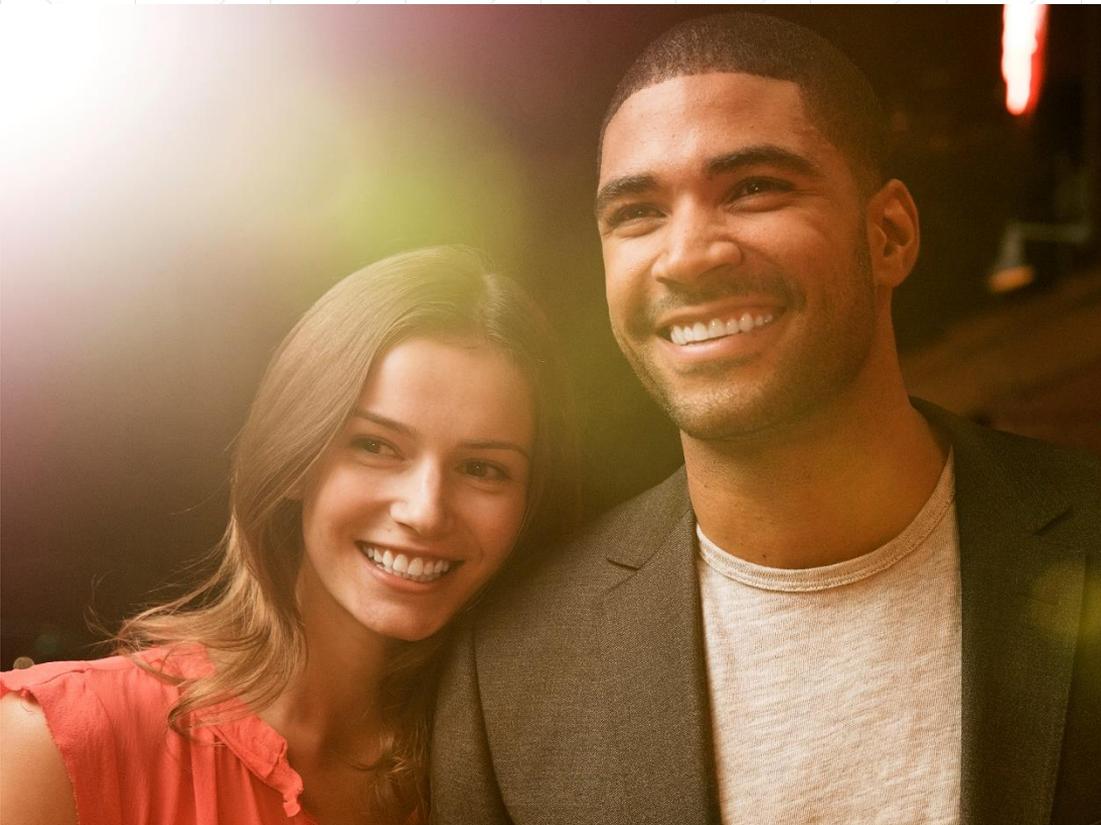


1.8M+
Doc Locator
Searches



745K+
Social
Media Fans

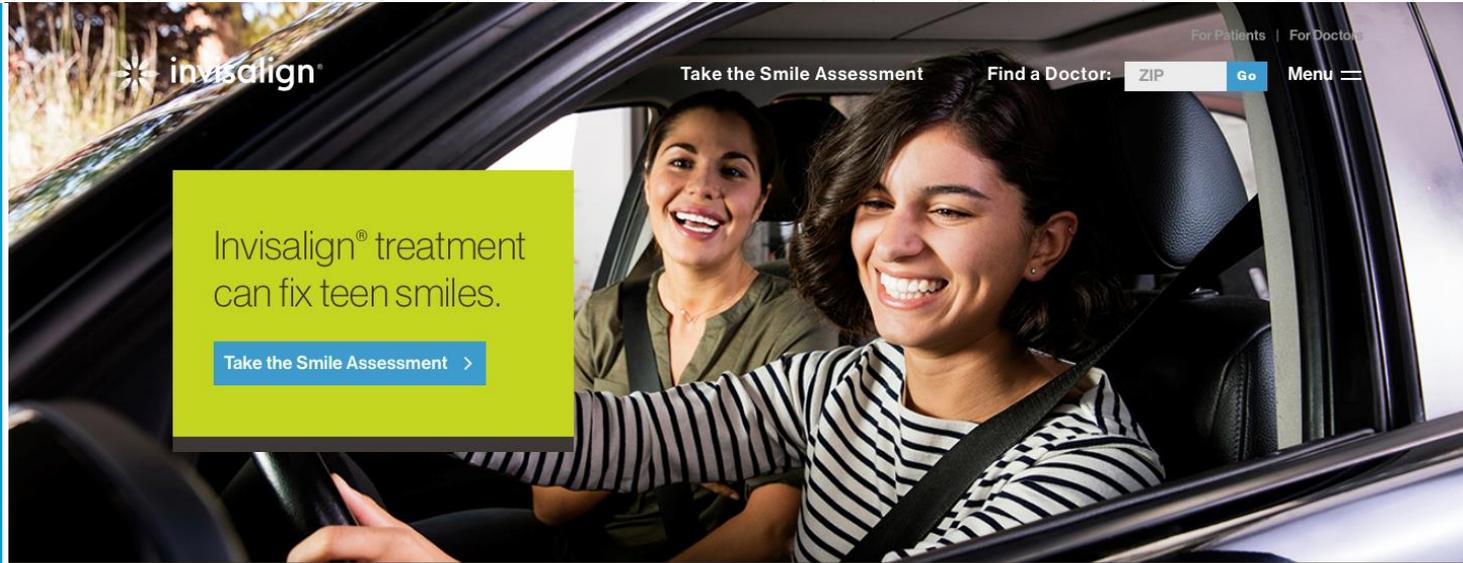
Connecting People to Their Smiles



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



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



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

Currently 10% share of SAM

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

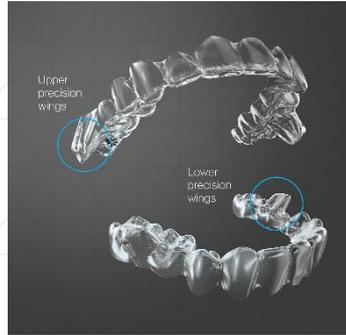


#1

Continuous Innovation Increases Applicability and Drives Adoption of Invisalign



iTero Element 2
High Performance



iTero Element Flex
Transportability



invisalign® go

Designed for Dentists.



align

Competition decades behind

21

YEARS AHEAD

Clinical Efficacy

Digital Workflow

Brand Appeal

A world map in light gray is centered on the page. A large, green diamond shape is superimposed over the map, with its vertices pointing towards the corners of the page. The text '10%' is written in a large, bold, green font, centered within the diamond.

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

Day 1

Day 2

Few Days



Jessica's
Dream



Instantaneous
Smile
Visualization



Make
Appointment



Consultation



Scanning



Instantaneous
Treatment
Plan



Aligners
Delivery



Wear it!

Connecting More Patients With Doctors

Smile Concierge Program

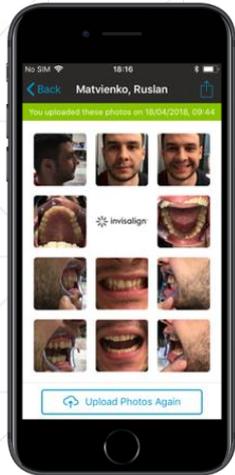
Let a Smile Concierge help you get started.

 **invisalign** | made to move

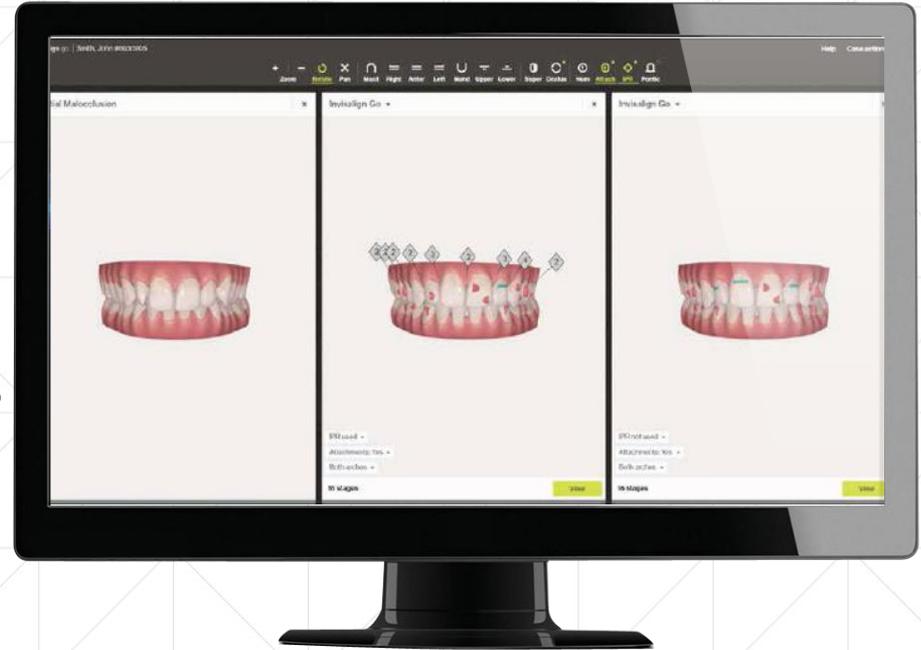
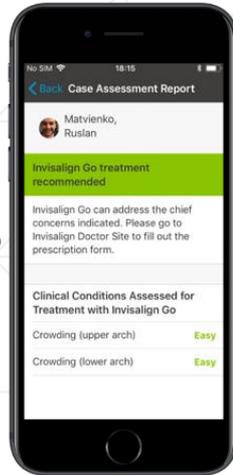


Invisalign
Store Pilots

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



align

 invisalign® | iTero®