FIA Data for Documenting Sustainability

Kim Cesafsky, Director of Sustainability Policy

April 17th, 2019
7 mills and 4 export terminals located throughout the US South

**Production Plants – 3.5 million MTPY Capacity**

- **Amory**
  - Location: Amory, MS
  - Startup: August 2010 (acquired)
  - Annual Production: 120K MTPY

- **Ahoskie**
  - Location: Ahoskie, NC
  - Startup: November 2011
  - Annual Production: 400K MTPY

- **Southampton**
  - Location: Southampton, VA
  - Startup: October 2013
  - Annual Production: 550K MTPY

- **Northampton**
  - Location: Northampton, NC
  - Startup: April 2013
  - Annual Production: 550K MTPY

- **Cottondale**
  - Location: Cottondale, FL
  - Startup: May 2008 (acquired)
  - Annual Production: 730K MTPY

- **Sampson**
  - Location: Sampson, NC
  - Startup: November 2016
  - Annual Production: 545K MTPY, expected to increase to 600K MTPY in 2019*

- **Greenwood**
  - Location: Greenwood, SC
  - Startup: February 2018 (acquired)
  - Annual Production: Expected to increase to 600K MTPY in 2019*

**Storage and Terminaling Assets**

- **Port of Mobile**
  - Location: Mobile, AL
  - Startup: 3rd Party Agreement
  - Storage: Flex barge storage with 45K+ metric tons of capacity

- **Port of Chesapeake**
  - Location: Chesapeake, VA, wholly-owned by Enviva
  - Startup: November 2011
  - Storage: Dome storage with 90K metric tons of capacity

- **Port of Panama City**
  - Location: Panama City, FL
  - Startup: 3rd Party Agreement
  - Storage: Warehouse storage with 32K metric tons of capacity

- **Port of Wilmington**
  - Location: Wilmington, NC, wholly-owned by Enviva
  - Startup: 2016
  - Storage: Dome storage with 90K metric tons of capacity
Growing Global Wood Pellet Demand

- Total global pellet demand was 31 million MT in 2017, including 14.8 million MT of consumption in the industrial sector and 16.1 million MT in the residential and commercial heating sector. Current indications suggest that the market will grow by +12% (+3.8 million MT) in 2018, bringing total global demand to 34.8 million MT\(^1\).

Global pellet demand forecast (heat & industrial) to 2022

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\(^1\) Hawkins Wright: The Outlook for Wood Pellets – Demand, Supply, Costs and Prices; Second Quarter 2018
Enviva’s facilities are certified to industry-leading forest and biomass sustainability programs, which provide 3rd party assurance over our sourcing practices and help demonstrate compliance with regulatory requirements in our end use markets.

- **Sustainable Forestry Initiative (SFI)**
  - SFI Certified Sourcing Certification
  - SFI Chain of Custody Certification

- **Forest Stewardship Council (FSC)**
  - FSC Chain of Custody Certification

- **Programme for the Endorsement of Forest Certification (PEFC)**
  - PEFC Chain of Custody Certification

- **American Tree Farm System (ATFS)**
  - Independently Managed Group

- **Sustainable Biomass Program**
We rely on FIA program data to characterize forests in our supply regions and demonstrate that they are being managed sustainably.

2.5 Quantification of the Supply Base

Supply Base (data sources: a, b & c (US Department of Agriculture Forest Service, 2014))

a. Total Supply Base area (ha): 15.9 million hectares
b. Tenure by type in the entire supply region (ha):

<table>
<thead>
<tr>
<th>Ownership Type</th>
<th>Millions/ha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>13.4</td>
</tr>
<tr>
<td>Federal</td>
<td>1.8</td>
</tr>
<tr>
<td>State/local</td>
<td>0.7</td>
</tr>
</tbody>
</table>

c. Forest by type in the entire supply region (ha):

<table>
<thead>
<tr>
<th>Major Forest Type Groups</th>
<th>ha</th>
</tr>
</thead>
<tbody>
<tr>
<td>White / red / jack pine group (100)</td>
<td>114,507</td>
</tr>
<tr>
<td>Spruce / fir group (120)</td>
<td>12,882</td>
</tr>
<tr>
<td>Longleaf / slash pine group (140)</td>
<td>203,000</td>
</tr>
<tr>
<td>Loblolly / shortleaf pine group (160)</td>
<td>4,335,313</td>
</tr>
<tr>
<td>Other eastern softwoods group (170)</td>
<td>52,533</td>
</tr>
<tr>
<td>Exotic softwoods group (380)</td>
<td>1,145</td>
</tr>
<tr>
<td>Oak / pine group (400)</td>
<td>1,905,021</td>
</tr>
<tr>
<td>Oak / hickory group (500)</td>
<td>7,238,660</td>
</tr>
<tr>
<td>Oak / gum / cypress group (600)</td>
<td>1,176,817</td>
</tr>
<tr>
<td>Elm / ash / cottonwood group (700)</td>
<td>473,188</td>
</tr>
<tr>
<td>Maple / beech / birch group (800)</td>
<td>192,866</td>
</tr>
<tr>
<td>Aspen / birch group (900)</td>
<td>5,499</td>
</tr>
<tr>
<td>Other hardwoods group (960)</td>
<td>82,296</td>
</tr>
<tr>
<td>Exotic hardwoods group (990)</td>
<td>22,621</td>
</tr>
<tr>
<td>Nonstocked (999)</td>
<td>128,136</td>
</tr>
<tr>
<td>Total</td>
<td>15,944,484</td>
</tr>
</tbody>
</table>
Sustainable biomass sourcing requires significant attention to detail. At Enviva, we hold ourselves accountable for responsible sourcing practices by tracking and publishing key metrics.

In January of 2017, Enviva launched Track & Trace, a proprietary and industry leading system for tracking our primary wood sourcing from forest or sawmill to facility.

We publish the following information for each tract:

<table>
<thead>
<tr>
<th>County</th>
<th>Landowner Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest Type</td>
<td>Harvest Type</td>
</tr>
<tr>
<td>Age Class</td>
<td>Harvest Acres</td>
</tr>
<tr>
<td>% Volume to Enviva</td>
<td>Map Location</td>
</tr>
</tbody>
</table>
Transparency

Visual Display of Forest Area & Inventory on Enviva’s Track & Trace® Website

Tract Detail
Hover over tract points to view harvest details.
Enviva only sources from working forests that will be regenerated and remain as forests.

Tract Detail
- County
- Sampson
- Landowner Type
- Family Forest
- Forest Type
- Mixed Pine & Hardwood
- Harvest Type
- Final
- Age Class
- 20 to 30 years
- Harvest Acres
- 178
- % Volume to Enviva
- 39%

Track & Trace

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Visual Display of Forest Area & Inventory on Enviva’s Track & Trace® Website

Forest Trend Map

The map and graphs below present data from the USDA Forest Service on current and historic forest conditions in the US South and in each of Enviva’s forest supply areas. The total forest area in the US South has stabilized since 2000, while forest inventories have increased significantly.

Counties are shaded according to the percentage of their total land area that is currently forested. The darker green represents counties with a greater proportion of forestland. The graphs below display forest area and inventory over time. Select your Enviva forest supply area of interest for greater detail.

Forest Area

Million Acres


200 205 210

County
Chesterfield, South Carolina
73 % Forest

Forest Inventory

Billion Tons


10 11 12 13 14 15 16

Track & Trace

Leaflet | Map data © OpenStreetMap contributors. CC-BY-SA. Imagery © Mapbox. Star icon by Google from www.flaticon.com
Putting the Scale of US Southern Forests into Context for International Stakeholders

United States is about 237 times **bigger** than Netherlands.

Netherlands is approximately 41,543 sq km, while United States is approximately 9,833,517 sq km. Meanwhile, the population of Netherlands is ~17.1 million people (309.5 million more people live in United States). We have positioned the outline of Netherlands near your home location of Washington, DC, United States.
Strategic Decision-making

FIA Data Used for Development Due Diligence

- Characterize forests and available inventory in the supply area
- Understand demand environment
- Perform growth : drain assessments
- Baseline inventory data for modeling long term timber supply

LUCEDALE SUSTAINABILITY REPORT

JANUARY 3, 2019

Total Acres = 4.3 million
Private Acres = 3.6 million

- Planted Pine: 0.5 million (13%)
- Natural Pine: 0.7 million (20%)
- Mixed Pine/Hardwood: 0.4 million (10%)
- Lowland Hardwood: 0.9 million (25%)
- Upland Hardwood: 1.1 million (32%)

Total Inventory = 181.1 million tons

- Planted Pine: 12.8 million (7%)
- Natural Pine: 44.4 million (25%)
- Mixed Pine/Hardwood: 18.2 million (10%)
- Lowland Hardwood: 57.8 million (32%)
- Upland Hardwood: 47.8 million (26%)
Emerging Issues & Future Needs

FIA Data Critical to Compliance with Forthcoming EU-wide Sustainability Criteria

What is guaranteed by the EU sustainability criteria for BIOENERGY IN RED II?

Bioenergy, to be...
- accounted towards the overall renewable energy targets
- gain financial (public) support
- need to meet the sustainability and greenhouse gas emission savings criteria irrespectively of the geographical origin

SUSTAINABILITY CRITERIA

Agricultural biomass
- Protection of highly biodiverse land
- Additional criteria in case of land use change:
  - Protection of land with high carbon stock, namely if it had the status of wetlands or continuously forested areas in 2008, but no longer has this status
- Protection of land that was peatland in January 2008

Forest biomass
- Legality of harvesting operations
- Forest regeneration of harvested areas
- Areas designated by law for nature protection purposes including in wetlands/peatlands are protected
- Harvesting is carried out considering maintenance of soil quality and biodiversit
- Long-term production capacity of forests is maintained or improved
- LULUCF criteria
- Risk-based approach:
  a) Sustainability criteria are in place and enforced at national level
  b) If not, sustainability criteria have to be ensured at sourcing area level
Forward-Looking Statements and Cautionary Statements

Forward-Looking Statements

This presentation contains “forward-looking statements” within the meaning of the securities laws. All statements, other than statements of historical fact, included in this presentation that address activities, events or developments that Enviva Partners, LP (NYSE: EVA) ("Enviva," "we," or "us") expects, believes or anticipates will or may occur in the future are forward-looking statements. The words “believe,” “expect,” “may,” “estimates,” “will,” “anticipate,” “plan,” “intend,” “foresee,” “should,” “would,” “could,” or other similar expressions are intended to identify forward-looking statements, which are generally not historical in nature. However, the absence of these words does not mean that the statements are not forward-looking.

These statements are based on certain assumptions made by Enviva based on management’s expectations and perception of historical trends, current conditions, anticipated future developments and other factors believed to be appropriate. Although Enviva believes that these assumptions were reasonable when made, because assumptions are inherently subject to significant uncertainties and contingencies that are difficult or impossible to predict and are beyond its control, Enviva cannot give assurance that it will achieve or accomplish these expectations, beliefs or intentions. A number of the assumptions on which these forward-looking statements are based are subject to risks and uncertainties, many of which are beyond the control of Enviva, and may cause actual results to differ materially from those implied or expressed by the forward-looking statements. These risks and uncertainties include the factors discussed or referenced in our filings with the Securities and Exchange Commission (the “SEC”), including the Annual Report on Form 10-K and the Quarterly Reports on Form 10-Q most recently filed with the SEC, including those risks relating to financial performance and results, economic conditions and resulting capital restraints, availability of sufficient capital to execute Enviva’s business plan, the ability of Enviva to complete acquisitions and realize the anticipated benefits of such acquisitions, impact of compliance with legislation and regulations and other important factors that could cause actual results to differ materially from those projected. When considering the forward-looking statements, you should keep in mind the risk factors and other cautionary statements in such filings.

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