



# **Ecuadoriana Airlines**

September 1st 2020



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## About us



## Growth potential for:

Codeshare agreements with international pass/cargo airlines

Passenger, cargo, mail & charter opportunities

Large turboprop aircraft from the same family allowing cross-training

Mainland-Galapagos Islands flights linking new city pairs and Intra Galapagos Air service.

Transborder International Air Service between Colombia, Ecuador, Perú



## Our Advisors

Ecuatoriana Airlines is working together with experienced partners and advisors.

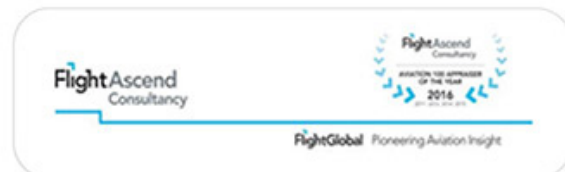
### Flight Ascend

**Consultancy** – Premium data suppliers and analysts in the world



### Flight Ascend

[www.flightglobal.com/consultancy](http://www.flightglobal.com/consultancy)



### Air Transport Business

**Development** – start-up airline experts – team members executed 20+ start-ups globally.



### Air Transport Business Development

[www.airtransportbd.com/](http://www.airtransportbd.com/)





# Our Network

City	bus time	Flight time
Quito-Salinas*	10 hrs.	1.00 hr
Quito-Manta	12 hrs.	1.00 hr.
Quito-Esmeraldas*	6 hrs.	1.00 hr.
Quito-Cuenca	12 hrs.	1.00 hr.
Quito-Loja	14 hrs.	1.05 hr.
Quito-Macas*	6 hrs.	0.40 min
Quito-Coca	6 hrs.	0.40 min
Quito-Santa Rosa	11 hrs.	1.00 hr.
Quito-Lago Agrio*	6 hrs.	0.40 min.
Guayaquil-Cuenca	3.5 hrs.	0.35 min.
Guayaquil-Loja	5 hrs.	0.40 min.
Guayaquil-Latacunga	7hrs.	0.40 min.
Guayaquil-Esmeraldas	10 hrs.	1.00 hr.
Cuenca-Quito	12 hrs.	1.00 hr.
Cuenca-Salinas	5.5 hrs.	0.45 min
Cuenca-Esmeraldas	14 hrs.	1.05 hr.







# Ecuador

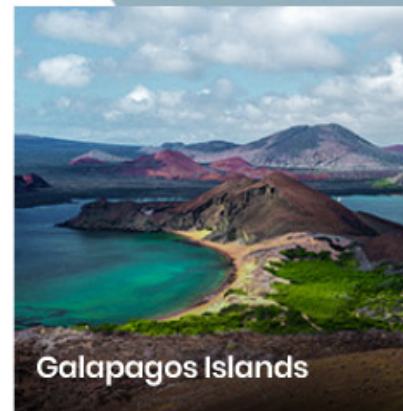


Stable  
democracy in  
South America  
located between  
Colombia and  
Peru

International Airlines  
Serving Ecuador 1 QT  
2020 Delta, LATAM,  
Copa, GOL, American,  
United, Iberia, Air  
Europa, Plus Ultra, Spirit  
Avianca, JetBlue, KLM,  
Air Canada,  
AeroMexico, Air France,  
Interjet, Eastern

Population: 16.5  
million  
GDP per capita  
(PPP): \$11,788  
Currency: US  
dollar economy  
OPEC member

Rugged  
geography, very  
high biodiversity,  
Galapagos  
Islands,  
eco-tourism



Galapagos Islands



Amazon



Andes



Pacific Coast

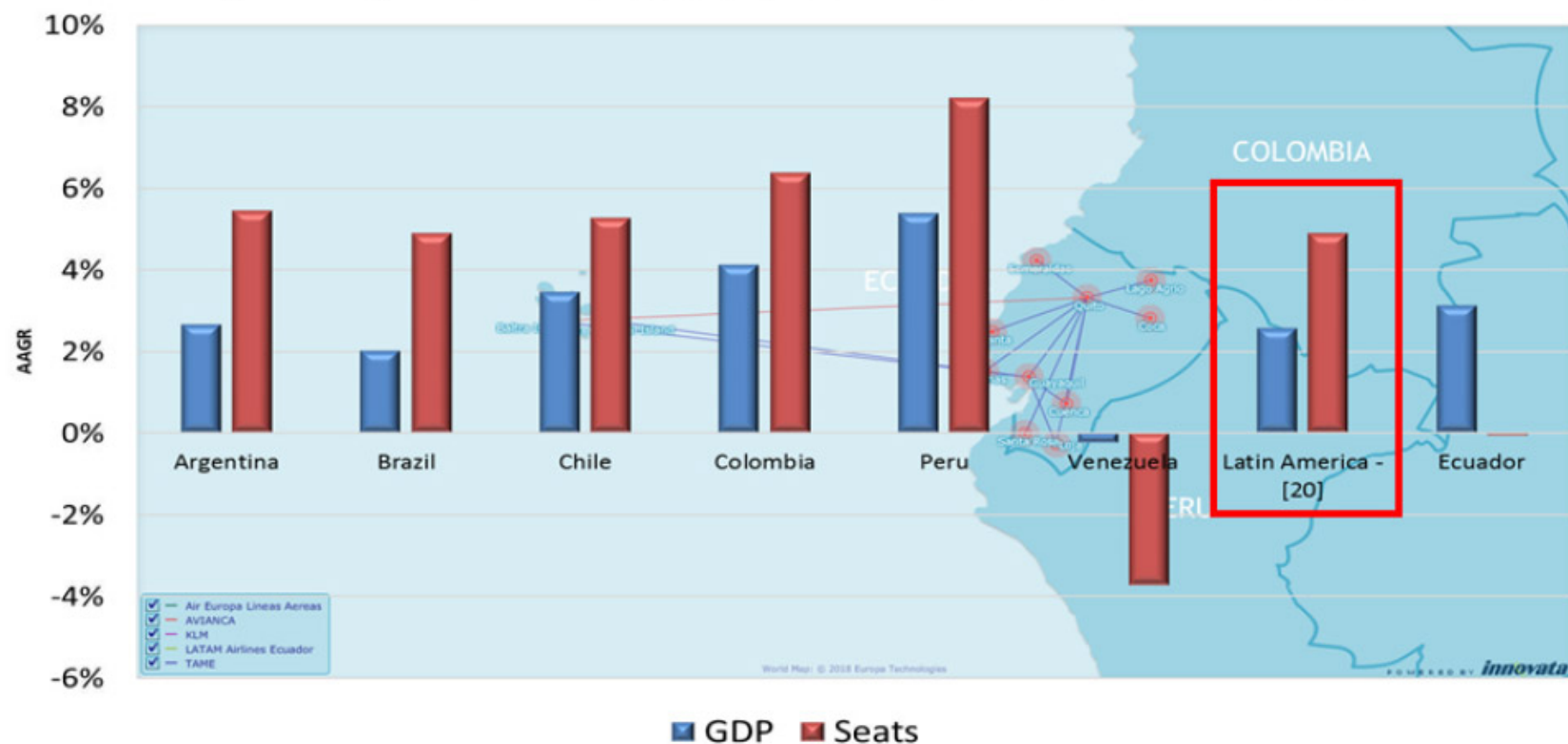
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## Ecuador has missed out on Aviation growth

In South America most countries show a gearing of about 2:1 between Departing Seats and GDP average growth (AAGR), 2005-17. Ecuador appears to have missed out on 6% p.a. seats growth - thus failing to double the size of airline services in a decade

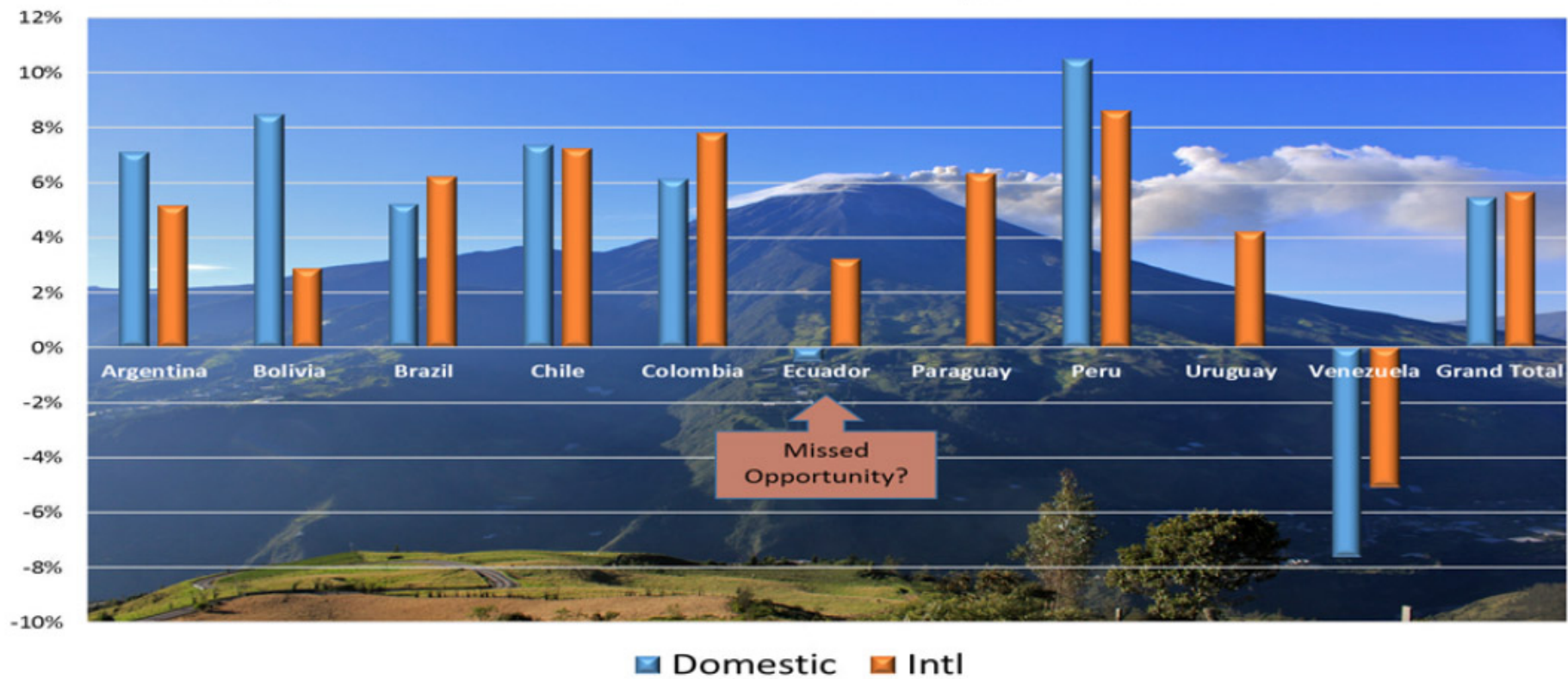




## Domestic air seats evolution

### Routes have reduced, despite GDP and tourism growth

Average Annual Growth in Domestic and International seats by S. American countries 2006-2018







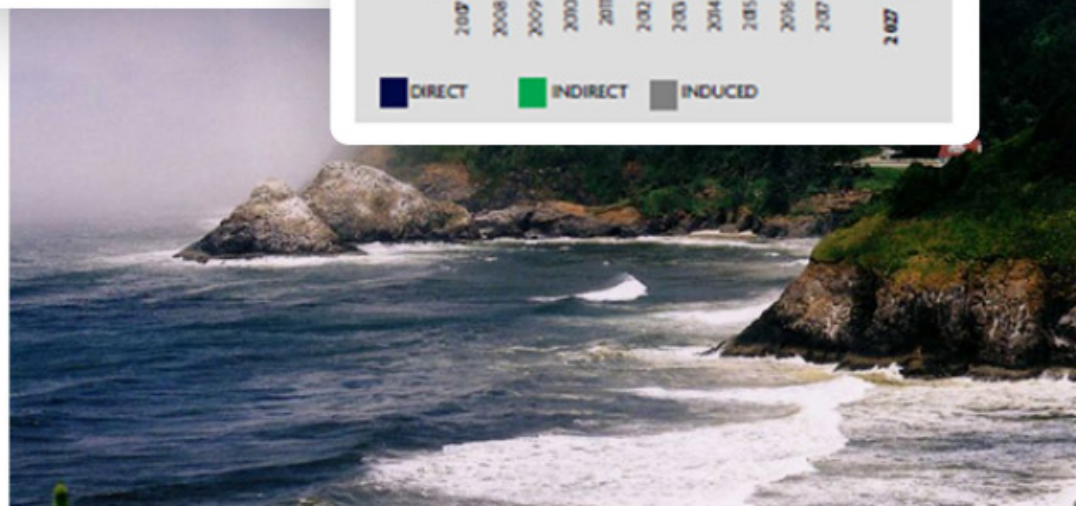
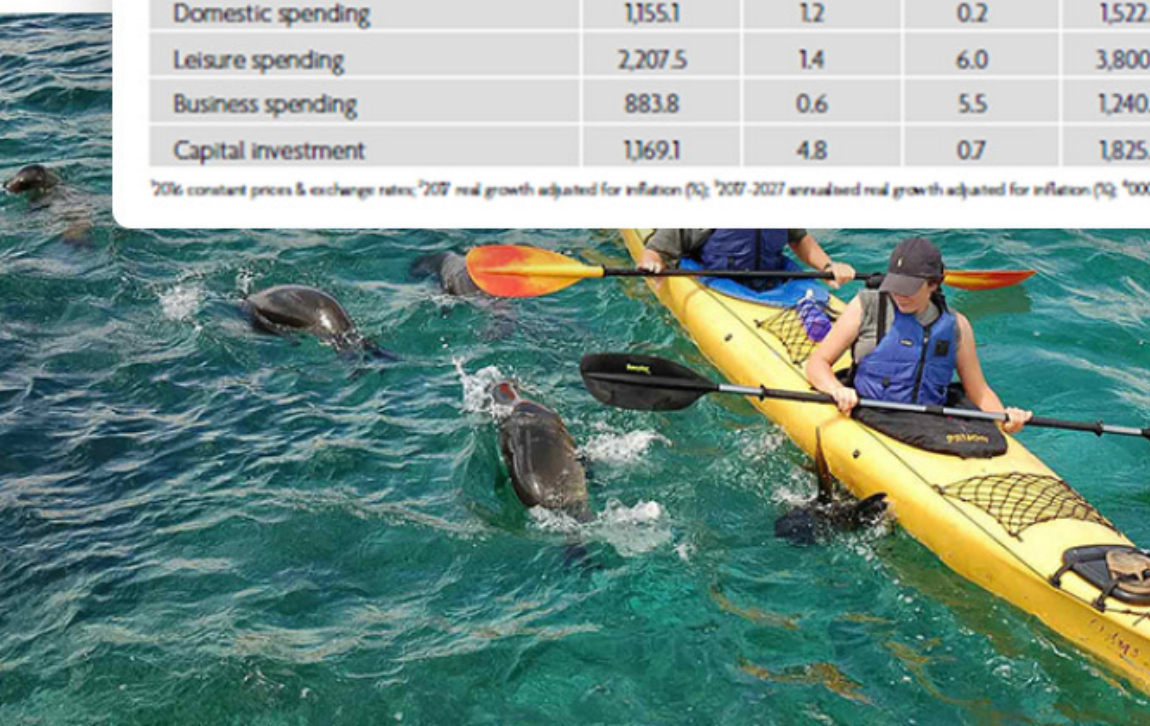
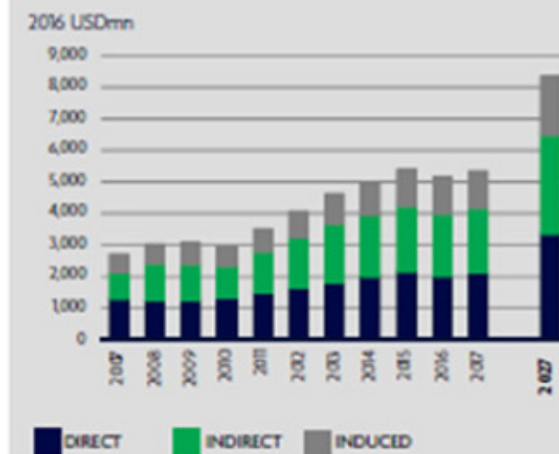
# Ecuador Tourism- Future Growth



Ecuador	2016 USDm <sup>1</sup>	2016 % of total	2017 Growth <sup>2</sup>	USDm <sup>1</sup>	2017 % of total	Growth <sup>3</sup>
Direct contribution to GDP	2,033.7	2.0	6.1	3,364.6	2.5	4.5
Total contribution to GDP	5,120.1	5.1	4.5	8,351.4	6.1	4.6
Direct contribution to employment <sup>4</sup>	137	1.9	7.1	196	2.3	2.9
Total contribution to employment <sup>4</sup>	344	4.7	5.4	479	5.7	2.8
Visitor exports	1,936.1	10.1	9.3	3,519.1	15.6	5.2
Domestic spending	1,155.1	1.2	0.2	1,522.2	1.1	2.8
Leisure spending	2,207.5	1.4	6.0	3,800.8	1.8	5.0
Business spending	883.8	0.6	5.5	1,240.6	0.6	2.9
Capital investment	1,169.1	4.8	0.7	1,825.6	6.1	4.5

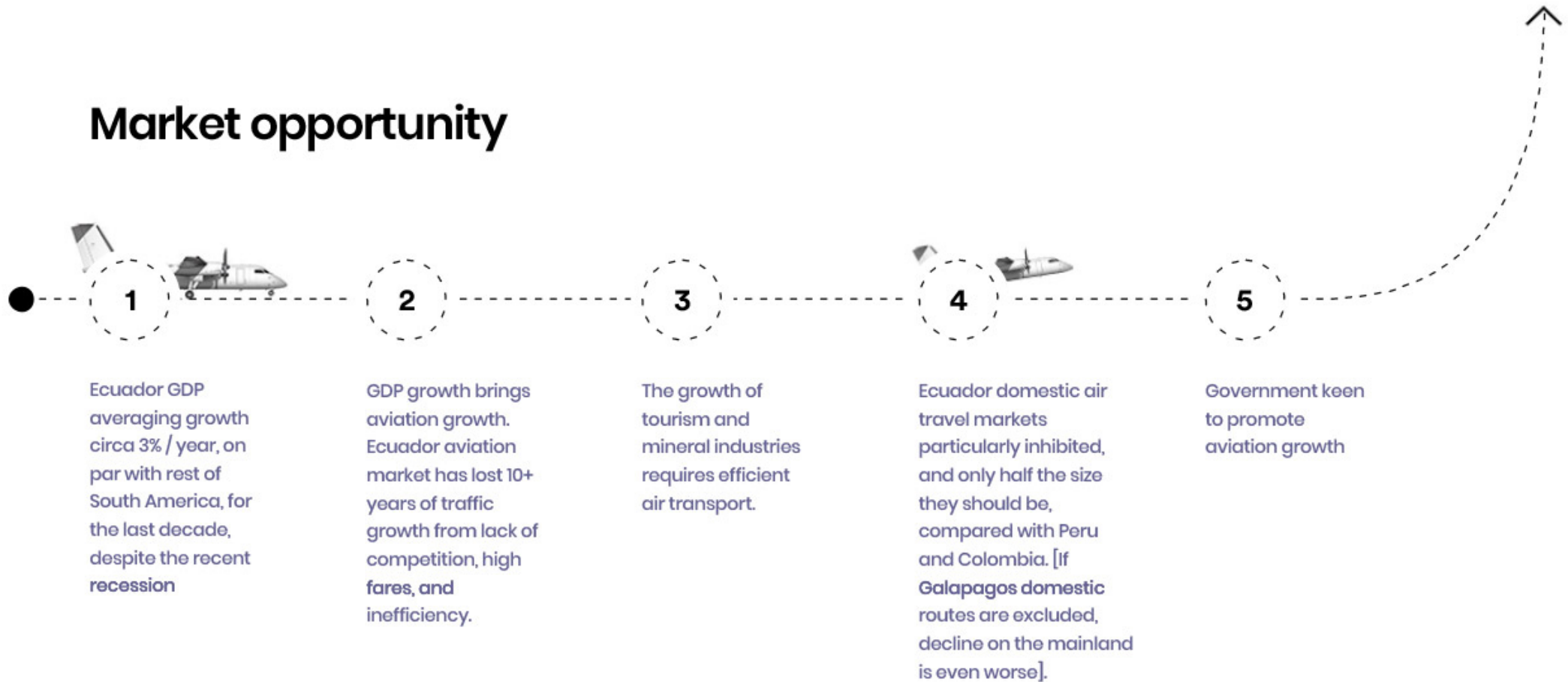
<sup>1</sup>2016 constant prices & exchange rates; <sup>2</sup>2017 real growth adjusted for inflation (%); <sup>3</sup>2017-2027 annualised real growth adjusted for inflation (%); <sup>4</sup>000 jobs

TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP





## Market opportunity



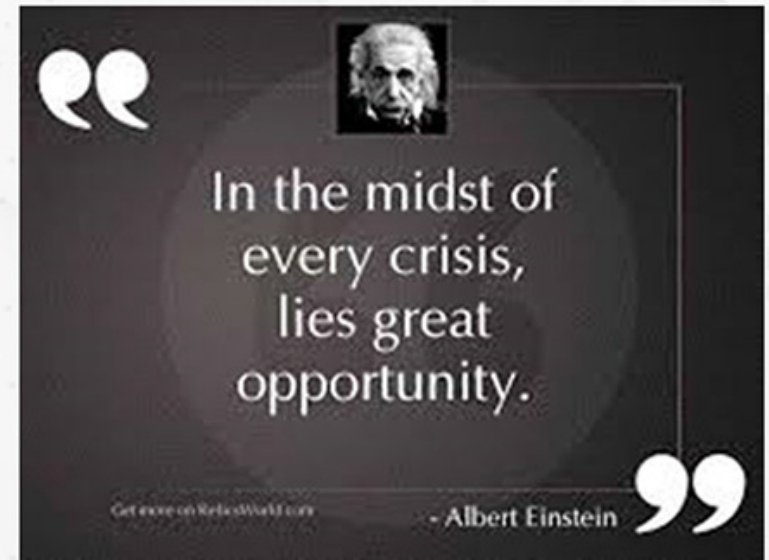
Market opportunity for a new airline to identify and satisfy unmet demand. Generate new air service between key locations, particularly catering for domestic business and tourist traffic





## Post COVID-19 opportunities

1. **Domestic routes are essential “social routes”**  
Stimulate local economy & trade.
2. **International tourism will gravitate to less-crowded destinations** like Ecuador and Galapagos Islands which already has a 50% capacity on cruise ships and on certain islands
3. **Ecuador offers excellent value** and a variety of activities for low, middle, and upper-income tourists.
4. **Focus on tourism.** Oil industry plummets. Re-focus on tourism, hospitality and gastronomy to support economy & recovery.
5. **Eco/Exotic tourism had seen a 13% increase** (Sky Magazine March 2016) prior to the COVID outbreak. Predicted rise 2021.





## Our Proposition & Timing

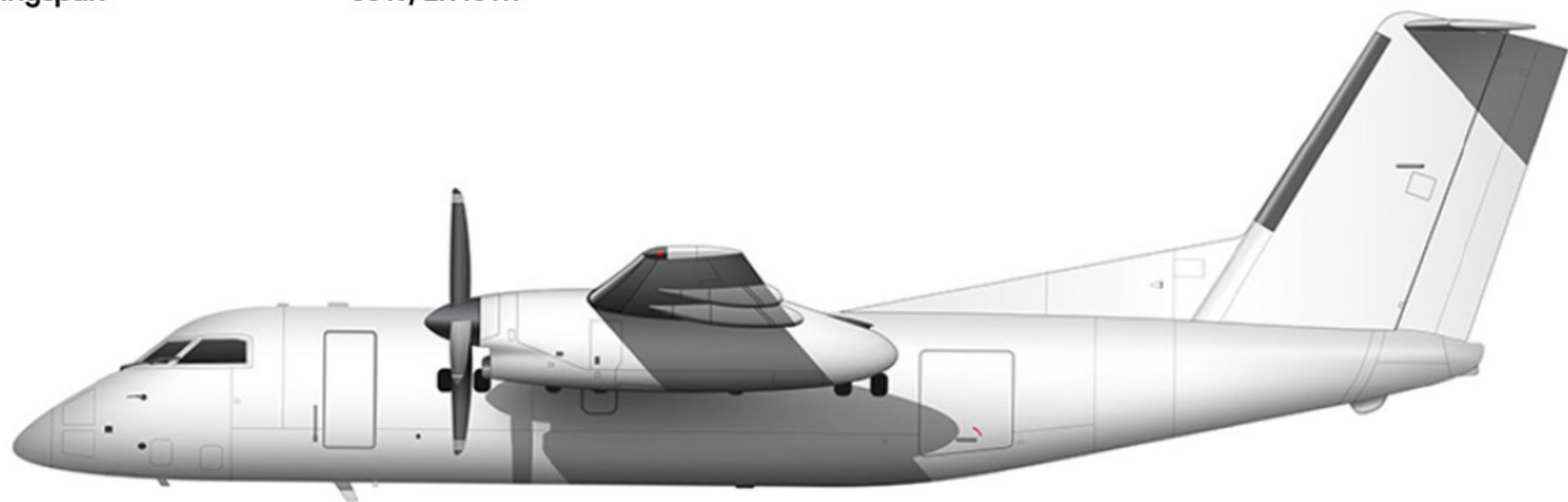
1. **Market data proves** Ecuador market needs new airline. Ecuatoriana.
2. **Fly Ecuador domestic**, promote tourism, social and business routes
3. **Modern, fuel-efficient 37-seat** DHC8-200 turboprop aircraft
4. **Experienced management** backed-up by expert contractors
5. **Low cost fares, convenient schedule**, outstanding customer service
6. **Starting with 3 x DHC8-200** to 6 aircraft within 12 months
7. **Planned 1QT 2021 start** of operations with three aircraft
8. **Experienced professionals**, available talent





# Dash 8-200

Model	Q200
Cockpit Crew	2
Cabin Crew	1
Passengers (Typical)	37
Max Capacity	40
Length	73 ft / 22.25 m
Height	24 ft 7 in / 7.49 m
wingspan	90 ft / 27.40 m





## Our contact



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