



Americas Focus

YOUR SOURCE FOR IATA'S LATEST REGIONAL ACTIVITIES

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2024



Dear Colleagues,

While the industry is in the middle of a busy summer season, we [welcomed](#) some good news in Argentina, where the Government of President Milei issued a national decree aimed at opening up the country's aviation sector. The reform will boost the number of routes, flight frequencies and create more fair competition amongst operators. In addition to the new decree the government has signed several agreements promoting Open Skies between Argentina and Brazil, Chile, Peru, Ecuador, Panama, Uruguay and Canada, which are expected to further increase connectivity.

These policy improvements and agreements with other countries will help the airline industry to better connect Argentina to the rest of the world and strengthen the country's tourism sector.

I look forward to more discussions between the authorities and the industry to maximize air transport in the country's economic and social development at our upcoming [Aviation Day](#) for Argentina on September 5th in Buenos Aires.

From a wider industry perspective, IATA released its latest global passenger data for May 2024: Strong demand for travel continues with airlines posting a 10.7% year-on-year increase in travel for May. Airlines filled 83.4% of their seats, a record for the month.

In the Americas, North American carriers saw an 8.1% year-on-year increase in demand. Capacity increased 9.7% year-on-year, and the load factor fell to 84.0% (-1.2ppt compared to May 2023).

Latin American airlines saw a 15.9% year-on-year increase in demand. Capacity climbed 14.3% year-on-year. The load factor rose to 85.1% (+1.2ppt compared to May 2023), the highest among the regions! You can access the full analysis with more details [here](#).

Lastly, I am pleased to share that Helen Kouyoumdjian has joined us as IATA's Country Manager for Chile, after Gabriela Peralta's well-deserved retirement. You can reach Helen at kouyoumdh@iata.org and I am confident Helen will be of great support to you and our industry for any Chile specific priorities.

As usual, please find IATA's latest activities across the Americas below.

Please do not hesitate to reach out with any questions or ideas for further follow up. Thank you for your on-going support.



PETER CERDÁ

REGIONAL VICE PRESIDENT
THE AMERICAS



AIR PASSENGER MARKET IN DETAIL

[FULL ANALYSIS HERE](#)

MAY 2024 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	10.7%	8.5%	1.7%	83.4%
Africa	2.1%	13.4%	8.5%	3.2%	72.9%
Asia Pacific	31.7%	14.9%	9.2%	4.0%	81.8%
Europe	27.1%	10.3%	9.7%	0.4%	85.2%
Latin America	5.5%	7.9%	5.3%	2.0%	83.4%
Middle East	9.4%	10.2%	8.9%	0.9%	80.8%
North America	24.2%	6.5%	6.5%	0.0%	85.8%

1) % of industry RPKs in 2023 2) Year-on-year change in load factor 3) Load Factor Level



ARGENTINA: DECREE ISSUED TO INTRODUCE NEW REGULATORY FRAMEWORK FOR AIR TRANSPORT



The Argentine authorities have issued Decree 599/2024, introducing new regulations for commercial aviation markets, repealing previous rules, and modifying the Aeronautical Code. The comprehensive decree is expected to liberalize the Argentine market and increase the number of routes and frequencies, for both domestic and international flights, as well as introduce more competition for airport and ground handling services, allowing each airline to select their preferred service provider. This applies to both passenger and cargo operations. The decree also mandates a transitory capacity allocation procedure until October 2025, followed by a permanent system based on IATA and ACI WASG standards. Key principles include free market access, fair competition, fare deregulation, safety and security focus, operational service surveillance, commercial freedom, limited public administration intervention, transparency in airport capacity allocation, and stakeholder participation in decision-making. For more details, please contact IATA's Country Manager for Argentina, [Maria Jose Taveira](#).

BRAZIL: UPDATE ON ENGAGEMENT WITH NATIONAL COUNCIL OF JUSTICE TO REDUCE LEGAL CLAIMS FOR MORAL DAMAGES



CONSELHO NACIONAL DE JUSTIÇA

IATA met with members of the (CNJ) in Brasilia as a follow-up to the letter sent by IATA to Chief Justice Luis Roberto Barroso, President of the Federal Supreme Court and the CNJ. The outcome of the meeting was constructive, with the CNJ having a better appreciation of the negative impact on the industry related to moral damages. IATA proposed the creation of a discussion forum on aeronautical law and litigation arising from air carriage services, the possibility of organizing aeronautical law courses for the School of Magistrates, and a one-day conference in Brasilia in the second half of 2024 to engage in high-level discussions on judicialization and related issues. CNJ members committed to reviewing IATA's proposals and offered to develop educational seminars for judges in the states with the most judicial claims. For details, contact IATA's Assistant Director, External Relations, Brazil, [Marcelo Pedrosa](#).

BRAZIL: TAX EXEMPTION ADVOCACY FOR INTERNATIONAL FLIGHTS



IATA and JURCAIB sent a letter to the Special Secretary of Tax Reform requesting the inclusion of a provision in the supplementary law to consider international air transport of pax and cargo as exports, thus exempting it from taxes. The document emphasizes the importance of Brazil to continue adhering to ICAO's recommendations including the non-taxation of international air transport and requests the explicit provision of non-application of Dual VAT to international transportation. To prevent any ambiguity, IATA and JURCAIB proposed adding a clause to Article 79, explicitly stating the non-incidence of Goods and Services Tax (IBS) and Goods and Services Contribution (CBS) on international transportation. This would ensure legal security and prevent future disputes. For more details, please contact IATA's Country Manager for Brazil, [Dany Oliveira](#).

BRAZIL: IATA JOINS CONEXÃO SAF TO ADVANCE AVIATION DECARBONIZATION EFFORTS



IATA joined Conexão SAF, an [initiative](#) by ANAC to unite industry stakeholders in identifying and developing solutions for the Brazilian aviation sector's decarbonization journey through SAF. This forum serves as an important platform for fostering dialogue and collaboration among public and private entities, collectively paving the way for a more sustainable future for air travel in Brazil. It is structured in six thematic pillars, encompassing certification, policy incentives, commercial viability, research and development, infrastructure, and taxation. For details, please contact IATA's Senior Manager, External Affairs & Sustainability, [Pedro de la Fuente](#).

COLOMBIA: PROPOSED SAF CERTIFICATION PROCESS FOR SAF ROADMAP



Colombia's Civil Aviation Authority (Aerocivil) recently hosted a technical working group to discuss SAF certification processes, a key step in developing the Colombian SAF Roadmap. Attendees included representatives from the ministries of Environment, Agriculture, Energy, Transportation, Treasury, and Commerce, as well as stakeholders like DNP, Ecopetrol, RSB, BID, and Fedepalma. IATA presented on SAF certification, accounting, and registration in CORSIA, along with chain of custody methods and emission accounting at both national and international levels. Aerocivil emphasized the need for policy measures to establish a SAF registry, enabling airlines to sell scope 3 emissions and producers to connect with potential buyers in the international market. Aerocivil plans to host additional meetings and aims to present the SAF Roadmap to the National Government by Q4 2024. For more details, please contact IATA's Senior Manager, External Affairs & Sustainability, [Pedro de la Fuente](#).

CURACAO: CHARGES REVIEW FOR 2025-2027 PERIOD



Following the consultation with Curacao Airport Partners and DC-ANSP, IATA has progressed with the review of the charges for 2025-2027, and consolidated industry feedback and submitted it for consideration. IATA has also written a formal letter to the Regulatory Authority of Curacao (RAC) addressing concerns over the two-month notice period for the new fee implementation starting January 1, 2025. IATA has proposed to the RAC that new fees apply only to tickets sold from November 1 onward for travel starting January 1, with tickets sold prior exempt from the fee adjustment. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

GUATEMALA: IMPLEMENTATION PLAN FOR INDUSTRY COMPLIANCE WITH ELECTRONIC INVOICING



Following a meeting with the country's Superintendent of Revenue Service, the industry requested a 1-year extension to comply with the requirement to provide tax/personal ID in electronic invoices. The request was granted to ensure all airlines and agents can test and fully comply. For direct sales, IATA recommended a longer timeline for airlines, but the authority maintained a general 1-year extension. The modification to exclude passport numbers for non-resident foreigners was also agreed. For more details, please contact IATA's Regional Director, Financial & Distribution Services, [Alicia Lines](#).

JAMAICA: EXTENSION OF AERONAUTICAL CHARGES FOR KIN AND MBJ



The Jamaica Civil Aviation Authority (JCAA), extended the aeronautical charges for KIN and MBJ airports by another year, previously set to expire on December 31, 2024. For 2025, the airport operators are proposing CPI increases, which is in line to what was agreed in the previous rate setting exercise. In parallel, JCAA has issued the first round of consultation documents to determine the charges for the next period (2026-2030). This is the first step of several that comprise this exercise which will conclude in May 2025. IATA is reviewing the contents and will actively participate in the process with the JCAA, airport operators and member airlines. For more details, please contact IATA's Charges Manager, [Guillermo Rodriguez](#).

PERU: LIM CAPACITY DECLARATION



Following efforts by IATA and the industry, in the LIM Capacity Declaration Update meeting convened by the DGAC, the authority indicated that the initial allocation for the Winter 2024 season would be carried out with the current runway and terminal capacity, modifying the capacity reduction initially proposed. Moreover, DGAC indicated that, if required later, the modifications to capacity (increase or decrease, as appropriate) will be established in accordance with the slot regulation NTC 001-2022. Furthermore, the DGAC indicated that they will coordinate with the corresponding technical subject matter experts to minimize the reduction of combined operations caused by noise restrictions. For details, please contact IATA's Country Manager for Peru, [Martin La Rosa](#).

THE BAHAMAS: UPDATE ON BANSА OVERFLIGHT FEES



BANSА has accepted an extension of the consultation period, as requested by IATA and A4A on behalf of their members, which adds 30 days to the process. BANSА anticipates publishing a new notice of imposition and AIP by August 1, with the new scheme set to take effect on September 1, 2024. Currently, the industry is diligently reviewing the feedback presented during the second consultation meeting, focusing specifically on the details of the investment plan. Additionally, IATA and A4A plan to request a special technical meeting with BANSА to thoroughly review the investment plan before the final consultation, which is scheduled for July 31. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

UNITED STATES: CDC ISSUED CONCERNING ANIMAL IMPORTATION RULE



IATA has raised significant concerns about a final rule issued recently by the US Centers for Disease Control and Prevention (CDC) that seeks to address the public health risk of dog-maintained rabies virus variant (DMRVV) associated with the importation of dogs into the United States. The rule requires airlines to issue air waybills (AWBs) for dogs carried in the cabin or in checked luggage, which is problematic as AWBs are designed for cargo only. During a recent call with the CDC, airlines expressed concern that this requirement is unreasonable and complicates the transport of service dogs, which must be allowed in the cabin per US DOT regulations. The compliance deadline for the rule is 1 August 2024. IATA, Airlines for America, and other associations have [submitted a request](#) to CDC seeking an extension of the implementation date so that the AWB and other related issues can be resolved. If the rule is not amended, we anticipate that many airlines may prohibit dogs transport in checked luggage or cabins, potentially impacting travelers with disabilities. IATA urges all airlines to send their own letter to CDC in support of our request for an extension, addressed to Dr. Emily Pieracci, DVM via email at ydi7@cdc.gov. It would be extremely helpful if airlines could include data on the number of dogs (regular and service animals) they transport to the US over a given time to demonstrate the scope of this problem. For more details and a sample letter, please contact IATA's Vice President, Member & External Relations, [Doug Lavin](#).