



Dear Colleagues,

The past weeks have been marked by intense activity across the region, with three critical hotspots, Venezuela, Peru, and Brazil, shaping the aviation agenda. In Venezuela, ongoing airspace restrictions have created significant challenges for airlines and passengers. IATA has reiterated that safety must remain the number one priority, urging authorities to respect airlines' responsibility to make risk-based decisions. Airlines have temporarily suspended flights following safety alerts from the U.S. and Spain but remain committed to restoring connectivity as soon as conditions allow. IATA continues to call for dialogue and timely clarification from Venezuelan authorities to safeguard passenger protection and preserve the country's links to the world.

In Peru, discussions around the proposed TUUA transfer fee at Jorge Chávez Airport (LIM) have reached the highest levels. President José Jerí has set a tight deadline for a consensual solution, emphasizing the need to protect Peru's competitiveness and image. IATA, alongside industry stakeholders, is actively engaged to ensure outcomes that avoid harm to airlines and their passengers.

Meanwhile, in Brazil, advocacy efforts intensify against Bill No. 5.041/2025, which threatens to roll back progress by imposing rigid baggage and pricing rules. If enacted, the law would undermine connectivity, affordability, and Brazil's compliance with international agreements. You can find more details on these and all other regional activities below.

Looking at the latest economic data, October was a strong month for global air travel, with [passenger demand](#) up 6.6% year-on-year. North American carriers broke out of a months-long lull, posting 4.5% growth in international traffic, while Latin America continued its impressive momentum with a 7.2% increase. The trans-Atlantic corridor also showed steady improvement, up 3.8% compared to last year. The outlook for the remainder of 2025 is bright: scheduled seat capacity is set to grow 3.6% in November and 4.7% in December, signaling a robust finish to the year. Load factors remain strong across the Americas, reflecting healthy demand and confidence in the market.

On the [cargo side](#), challenges persist. Both North American and Latin American carriers saw a 2.7% year-on-year decline in air cargo demand in October—the weakest performance globally—though capacity edged up slightly (+0.1% in North America, +2.8% in Latin America). Despite these headwinds, the resilience of passenger traffic underscores aviation's role as a driver of connectivity and economic growth.

Last but not least, we are holding the last Aviation Day of 2025 in El Salvador next week. You can find all event-related materials [here](#) and I look forward to seeing many of you at the conference. Please let me know if you have any questions and thank you for your on-going support.



PETER CERDÁ

REGIONAL VICE PRESIDENT
THE AMERICAS



AIR PASSENGER MARKET

OCTOBER 2025. DETAILS [HERE](#).

OCTOBER 2025 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	6.6%	5.8%	0.7%	84.6%
Africa	2.2%	8.8%	8.3%	0.3%	73.9%
Asia-Pacific	33.5%	8.1%	6.6%	1.2%	85.1%
Europe	26.7%	6.7%	5.4%	1.1%	87.0%
Latin America and the Caribbean	5.3%	6.1%	5.8%	0.2%	84.6%
Middle East	9.4%	10.5%	8.1%	1.8%	82.4%
North America	22.9%	2.5%	3.6%	-1.0%	82.9%

AIR CARGO MARKET

OCTOBER 2025. DETAILS [HERE](#).

OCTOBER 2025 (%YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	100%	4.1%	5.1%	-0.5%	47.1%
Africa	2.0%	16.6%	20.0%	-1.2%	41.3%
Asia-Pacific	34.3%	8.3%	7.3%	0.5%	49.6%
Europe	21.5%	4.3%	4.3%	0.0%	54.7%
Latin America and the Caribbean	2.9%	-2.7%	2.8%	-2.2%	39.1%
Middle East	13.6%	5.7%	10.0%	-1.9%	46.7%
North America	25.7%	-2.7%	0.1%	-1.2%	40.9%

ARGENTINA: GROUND HANDLING MARKET UPDATE

In October, the Secretary of Transport granted preliminary authorization to Swissport to provide ground handling services in Argentina, making it the eighth company approved since market deregulation began. Previously authorized providers include Global Protection Service S.A., Fly Seg, Air Class Cargo, Handyway Cargo S.A., Escalum Investment S.A., MNZS S.A., and Jet Handling FBO S.A. On November 4, airport regulator ORSNA issued the General Regulations for the Selection of Ramp Service Providers, establishing guidelines for allocating space at airports with limited capacity and multiple applicants. IATA will review the new regulation with local authorities to clarify parameters and specific terms for awarding airport space, ensuring transparency and fair competition in the evolving ground handling market. For more details, contact IATA's Area Manager for Argentina, Paraguay and Uruguay, [Maria Jose Taveira](#).



BONAIRE: AIRPORT AND AIR NAVIGATION CHARGES

Bonaire International Airport (BIA) has clarified that its 2026 airport charge adjustment will be linked to the national price index, projected at 4.2% for 2025. However, the increase has been set at 3%, below the estimated inflation rate. Separately, the Dutch Caribbean Air Navigation Service Provider (DC-ANSP) confirmed that, following the July 3 user consultation, the unit charge for approach and aerodrome services at Bonaire will be USD 1,368.64 effective January 1, 2026, through December 31, 2028. This represents a 22.2% increase, lower than the 30.2% initially proposed. These adjustments aim to balance cost recovery with operational sustainability while mitigating the impact on airlines. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).



BRAZIL: UPDATE ON CONSUMER PROTECTION BILL NO. 5.041/2025



Brazil's Chamber of Deputies has approved Bill No. 5.041/2025, which mandates free checked and carry-on baggage, prohibits seat selection fees, and introduces other restrictions on airline practices. The next step is to discuss the text in the Senate. IATA and ALTA are actively [pushing back](#), warning the measure could raise costs, reduce connectivity, and breach bilateral air service agreements. On November 12, IATA, ABEAR, and industry representatives met with Senate leadership and regulators to stress the bill's economic impact and call for a technical review. Senate leaders committed to a structured debate and public consultation before advancing the proposal. IATA is gathering economic data requested by senators and coordinating outreach with foreign embassies, while reinforcing its position through major media outlets. For details, contact IATA's Country Manager for Brazil, [Simone Tcherniakovsky](#).

BRAZIL: PUBLIC CONSULTATION ON SAF REGULATION



The Ministry of Energy (MME) has opened public consultation on the draft decree for Brazil's National Sustainable Aviation Fuel Program (ProBioQAV). The proposal establishes a framework for SAF certification, market mechanisms, and compliance with the emissions-reduction mandate enacted in 2024. Key elements include a mandatory National Sustainability Certificate (CS-SAF) for producers, importers, and blenders, managed through a central registry to ensure traceability and enable Book & Claim transactions under reciprocity agreements. The decree aligns with CORSIA standards, adopting default and life-cycle assessment values, and assigns roles to ANP and ANAC for certification, oversight, and compliance verification. Flexibility mechanisms address supply constraints and cost impacts, with limited alternative compliance options. While the mandate applies to domestic aviation, international carriers may be affected under reciprocity clauses. Consultation runs until December 12, 2025. IATA is gathering member input for its response. For more details, please contact IATA's Senior Manager, Sustainability, [Pedro de la Fuente](#).

CANADA: IATA URGES ACTION ON KEY AVIATION PRIORITIES IN CANADA



Ahead of Canada's Federal Budget, IATA submitted a letter to the newly appointed Minister of Transport Hon. Steven MacKinnon, highlighting key priorities for the airline industry. The letter calls for action on four critical areas: improving cost competitiveness to ensure global viability, revising overly broad Air Passenger Protection Regulations that create operational inefficiencies, accelerating the development of a Canadian Sustainable Aviation Fuel (SAF) roadmap to meet climate objectives, and addressing aviation safety concerns related to potential 5G frequency interference. These measures are essential to strengthen Canada's aviation sector and support its role as a driver of economic growth. For more details, please contact IATA's Country Manager for Canada, [Ben Barrocas](#).

CHILE: PASSENGER RIGHTS LEGISLATION ADVANCES



On October 29, Chile's Economic Commission of the Chamber of Representatives released a consolidated draft merging several bills on passenger rights. Initially intended for domestic flights, the revised text may now affect international operations, prompting IATA and ACHILA to assess broader implications. Proposed amendments to the Aeronautical Code include higher compensation for delays and cancellations, a ban on overbooking, mandatory free carry-on baggage, and sequential coupon usage, among other measures. These changes could significantly impact airline operations and costs. IATA has prepared a position paper and is actively engaging with Congress to highlight the economic and operational risks of the proposals. Advocacy efforts will continue to ensure passenger protection is balanced with sustainable connectivity. For details, contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).

COLOMBIA: SARLAFT IMPLEMENTATION EXTENDED TO MAY 2026



The Superintendency of Transport has extended by six months (May 6, 2026) the implementation of the Single Infrastructure and Transport Circular related to the Risk Management System for Money Laundering, Terrorism Financing, and the Proliferation of Weapons of Mass Destruction (SARLAFT). Companies designated as obligated entities will have eight months from notification or registration to implement SARLAFT, while reporting deadlines to the UIAF remain independent of system implementation timelines. The resolution also clarifies that compliance officers of parent companies are not eligible to fulfill this requirement; a dedicated compliance officer must be based in Colombia. This extension provides additional time for companies to align with regulatory expectations and ensure robust compliance frameworks. For details, contact IATA's Country Manager for Colombia, [Paula Bernal](#).

MEXICO: PROPOSED AMENDMENTS TO CIVIL AVIATION AND IMMIGRATION LAWS



A new legislative proposal in Mexico seeks to strengthen protections for minors traveling by air through stricter documentation requirements, digital verification systems, and gender-sensitive protocols. The bill introduces new compliance obligations for airlines, including staff training, system upgrades, and penalties for non-compliance, aiming to curb child trafficking and enhance travel safety. IATA has provided input on the limitations airlines face in verifying the authenticity of documents and continues to monitor congressional discussions. The association is engaging with stakeholders to ensure that regulatory measures balance security objectives with operational feasibility. For more details, please contact IATA's Manager, External Affairs, [Alejandro Restrepo](#).

PERU: GOVERNMENT SEEKS RESOLUTION ON TUUA TRANSFER FEE



On November 26, President José Jerí convened a high-level meeting at the Presidential Palace to address concerns over the planned implementation of the TUUA transfer fee at Jorge Chávez International Airport, scheduled for December 7. Jerí instructed all relevant entities, including MTC, MINCETUR, MEF, OSITRAN, Contraloría, AETAI, IATA, and Lima Airport Partners (LAP), to present a consensus-based solution within one week to safeguard Peru's competitiveness and passenger interests. OSITRAN set the fee at USD 10.05 for international-international transfers and USD 6.32 for domestic-domestic transfers. These charges will apply starting December 7, 2025, and remain in effect until December 31, 2030. IATA and AETAI have presented different alternative solutions to the Government that protect Peru's connectivity and image abroad, such as extending the concession term. A resolution is expected in the coming days following technical discussions. For more details, please contact IATA's Area Manager for Peru, [Martín La Rosa](#).

UNITED STATES: POSITIVE REGULATORY DEVELOPMENTS IN THE U.S.



IATA welcomes two recent regulatory changes in the United States that reflect ongoing industry engagement. On 17 November 2025, the U.S. Department of Transportation withdrew its proposal to mandate passenger compensation for controllable flight disruptions, a framework initially modeled on EU-261 and Canada's APPR. This decision follows extensive lobbying by IATA and Airlines for America since the proposal's introduction in December 2024. Additionally, the U.S. Centers for Disease Control and Prevention (CDC) has removed the requirement for airlines to collect contact tracing information from arriving passengers. This change eliminates the need for separate data systems and aligns with plans by U.S. Customs and Border Protection to incorporate these elements into the established Advance Passenger Information System (APIS), a long-standing industry preference. For more details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

VENEZUELA: AIRSPACE SAFETY AND OPERATIONAL CHALLENGES



On December 1, IATA issued a [press release](#) addressing the evolving airspace situation in Venezuela, reaffirming that safety remains aviation's top priority. IATA has urged all relevant authorities to provide clarity and adopt a balanced approach, emphasizing that safety must remain the top priority and airlines must retain the right to make risk-based decisions. While some carriers have temporarily halted flights following alerts from U.S. and Spanish authorities, airlines remain committed to restoring connectivity to Venezuela once conditions allow. IATA continues to advocate for dialogue, transparency, and timely guidance to protect passengers and maintain Venezuela's international links. For more details, please contact IATA's Area Manager for Venezuela, [David Hernandez](#).