



Dear Colleagues,

As the summer season peaks across the Western Hemisphere, infrastructure challenges continue to impact aviation across the Americas. IATA is stepping up its engagement to address these issues and advocate for smarter, more connected investments.

In Lima, the long-delayed new terminal is now operational, but connectivity remains a problem—road access is incomplete, and the train still links only to the old terminal. In Santiago, passengers face long queues due to malfunctioning technology. Bogotá continues to struggle with runway and taxiway inefficiencies, while São Paulo's GRU expansion cannot come soon enough. Ironically, GRU's rail link remains underused due to safety and quality concerns. Most recently, torrential rains in Mexico City caused major disruptions at MEX, highlighting long-standing drainage issues and ineffective contingency planning—especially concerning ahead of next year's World Cup. And in North America, IATA has engaged the Port Authority of New York and New Jersey to jointly address the need for improved runway infrastructure at JFK Airport.

While the region has made progress in modernizing airport terminals and broader infrastructure, it's important to remind airport operators and government authorities that the journey doesn't end at the gate—it ends at the final destination. Infrastructure that connects airports to cities and people to opportunity must now take priority.

This is a message we will continue to emphasize across the region, as investment must extend beyond the terminal. Achieving this requires strong public-private collaboration across the entire travel and tourism value chain.

IATA's latest [June 2025 Air Passenger Market Analysis](#), further highlights the urgency for these type of joint infrastructure investments as Latin America and the Caribbean posted the highest international traffic growth globally with an impressive 9.3% year-over-year increase in international RPKs. While global international traffic growth slowed to 3.2% YoY, Latin America and the Caribbean demonstrated its resilience and potential as a key aviation and tourism hub. Meanwhile, North American carriers saw a 0.3% year-on-year fall in demand.

IATA has also released the latest edition of the [World Air Transport Statistics \(WATS\)](#), offering a comprehensive snapshot of global airline performance in 2024. Among the standout findings: international premium class travel surged by 11.8%, outpacing economy class growth and signaling a strong rebound in high-yield travel. The report also ranks the world's busiest airport pairs, with Jeju-Seoul (CJU-GMP) topping the list at 13.2 million passengers. In Latin America and the Caribbean, Bogota-Medellin (BOG-MDE) was the region's busiest route, with 3.8 million travelers, while New York John F. Kennedy International Airport-Los Angeles (JFK-LAX) was the busiest route in North America with 2.2 million passengers. I hope you find this data useful and please feel free to reach out with any questions or suggestions.

Lastly, as usual, please find below the latest IATA activities across the Americas for your reference. Thank you for your on-going support.



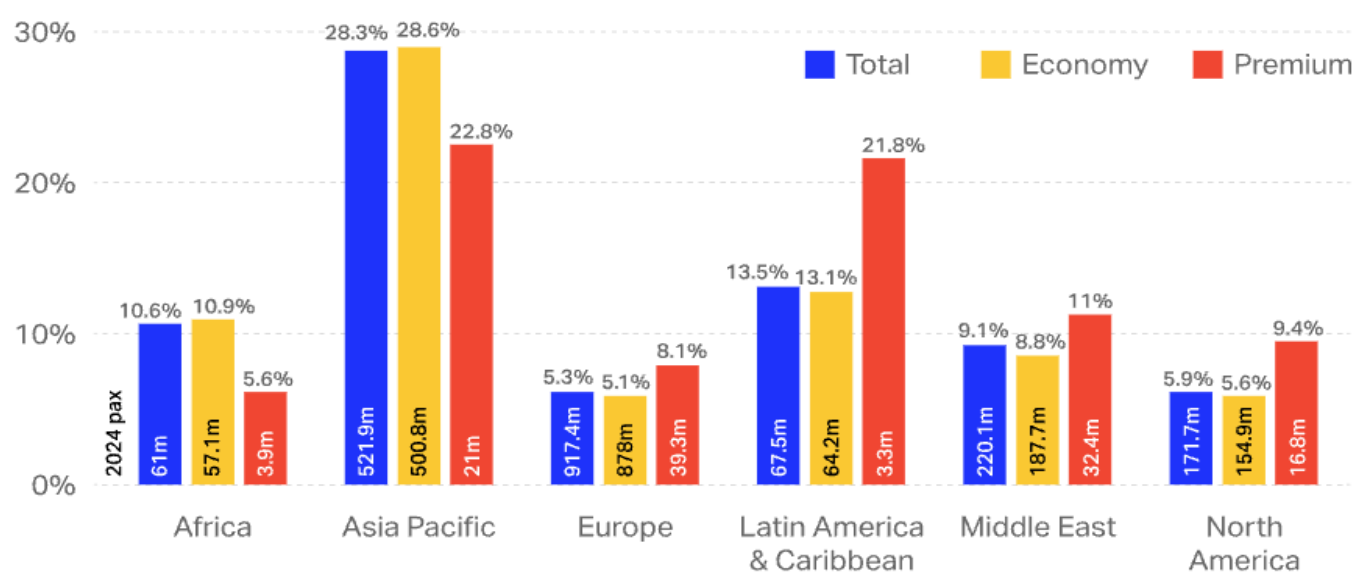
PETER CERDÁ

REGIONAL VICE PRESIDENT
THE AMERICAS



REGIONAL PAX GROWTH & NUMBERS BY CABIN CLASS

2024. DETAILS [HERE](#).



BIGGEST PASSENGER MARKETS

2024. DETAILS [HERE](#).

COUNTRY	PASSENGER	CHANGE %
United States	876m	5.2%
China (People's Republic of)	741m	18.7%
United Kingdom	261m	7.3%
Spain	241m	10.7%
India	211m	11.1%
Japan	205m	18.6%

*These figures include all passengers (international and domestic) departing or arriving in each country.

ARGENTINA: UPDATE ON INTERCARGO PRIVATIZATION

On July 28, Argentina's Ministry of Finance approved Resolution 1067/25, officially launching the privatization process for Intercargo. The resolution instructs the Secretary of Transport to begin due diligence and initiate all necessary steps to sell 100% of Intercargo's shares. The process is expected to be completed within eight months from the resolution's publication, around the end of March 2026. The move marks a significant shift in Argentina's approach to state-owned aviation assets. For more details, please contact IATA's Area Manager for Argentina, Paraguay and Uruguay, [Maria Jose Taveira](#).



ARGENTINA: UPDATE ON ROS AIRPORT CLOSURE DUE TO REPAVEMENT OF RUNWAY

On August 7, Santa Fe Governor Maximiliano Pullaro announced the launch of repaving and beaconing works on Rosario Islas Malvinas International Airport's (ROS) main runway 02/20. The USD 41 million project will upgrade the airport from Category I to Category III and the airport will be closed from September 20 to December 18, 2025. IATA formally urged Argentine authorities to publish an official NOTAM and allow airlines more time to adjust schedules. While the NOTAM was issued, the project's start date remains unchanged. The closure coincides with on-going operational restrictions at Montevideo (MVD) Airport, raising concerns on having enough suitable airport alternates in the Southern part of the region. For more details, please contact IATA's Area Manager for Argentina, Paraguay and Uruguay, [Maria Jose Taveira](#).



BRAZIL: JOINT SEMINAR TO ADDRESS EXCESSIVE LITIGATION IN AVIATION

IATA, in collaboration with Brazil's National School of Magistrates (ENM) and with support from the Brazilian Association of Magistrates (AMB), hosted a joint event in Curitiba to address the impact of excessive litigation on the aviation sector. The event brought together legal experts, public authorities, and industry stakeholders to explore solutions that enhance legal certainty and regulatory predictability. This initiative is part of a broader industry effort to reduce the high operational costs driven by unnecessary lawsuits. IATA emphasized the importance of judicial engagement in fostering a more efficient and balanced legal environment for aviation. Four additional regional seminars are planned for later this year to deepen dialogue with the judiciary and promote best practices in conflict resolution. For more details, please contact IATA's Assistant Director, External Relations, Brazil, [Marcelo Pedroso](#).

CANADA: IATA URGED FOR MORE COST COMPETITIVENESS IN PRE-BUDGET CONSULTATIONS

As part of Canada's 2025 Pre-Budget Consultations, IATA submitted a letter to the Ministers of Finance and National Revenue highlighting concerns over the cost competitiveness and sustainability of air travel in Canada. IATA called for a rebalancing of the user-pay model to ensure greater reinvestment into aviation infrastructure and the freezing of aviation-related fees and charges until government service providers demonstrate improved efficiency and reduced cost impact on consumers and the broader economy. IATA also urged the Government of Canada to support the industry's energy transition, continue backing international schemes like CORSIA, oppose unilateral emissions controls and carbon taxes, and promote the development of a domestic Sustainable Aviation Fuel (SAF) industry. For more details, contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

CHILE: SANTIAGO INTERNATIONAL AIRPORT (SCL) INFRASTRUCTURE ADVANCEMENTS CONTINUE

Significant progress is underway at Santiago International Airport (SCL) thanks to coordinated industry efforts with the Ministry of Public Works (MOP) and DGAC. On July 1, swing gate operations resumed at Concourse C, enabling domestic-to-international flight connections. In September, the new eastern access to Terminal 1 will open, including a dedicated AVSEC baggage screening area. Additionally, by the end of the year Concourse D will also allowing for swing expanded INT-DOM operations. These upgrades are expected to be fully operational before year-end, will enhancing passenger flow and connectivity across the terminal complex. For more details, please contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).

COLOMBIA: IMMIGRATION CONTROL FEE DELAYED FOR NON-SCHEDULED FLIGHTS

The Colombian Immigration Authority has postponed the implementation of the immigration control service fee for non-scheduled flights, including cargo operations, originally set to take effect on August 1, 2025. Under Resolutions 0633 and 2093 of 2025, the new fee will now be enforced starting October 1, 2025. The delay aims to ensure a technically sound and orderly transition, allowing for proper coordination with stakeholders across the aviation sector. IATA continues to monitor the situation and engage with authorities to support member airlines and ensure operational clarity. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).

COSTA RICA: MEETING WITH GOVERNMENT OFFICIALS TO ADDRESS CAPACITY CONSTRAINTS AT LIR

As part of IATA's ongoing engagement to resolve capacity issues at Daniel Oduber International Airport (LIR) in Liberia, IATA recently met with key government officials, including the Ministers of Tourism and Transport and the Director General of Civil Aviation. The government acknowledged that staffing shortages in air traffic control (ATC) were a major constraint and responded by authorizing 55 new ATC positions and extending ATC service coverage to 18 hours daily. Additionally, plans were announced to expand apron and terminal facilities, aiming to double the airport's capacity. The tender process is expected to conclude by the end of 2025, with construction beginning mid-2027. IATA will continue working closely with authorities to ensure that any slot regulations align with the World Airport Slot Guidelines (WASG). For more details, please contact IATA's Area Manager for Central America, [David Hernandez](#).

DOMINICAN REPUBLIC: SDQ ACTIVATES ALTERNATE RUNWAY DURING REHABILITATION WORKS

Runway 18-36 at Santo Domingo's Las Américas International Airport (SDQ)—formerly taxiway Juliet—officially became operational on July 29, 2025. This transition is part of the infrastructure plan to maintain operations during the rehabilitation of the main runway 17-35. Runway 18-36 will serve as SDQ's sole active runway through March/April 2026, ensuring continued safety and operational continuity. IATA is working closely with Aerodom and the Dominican Civil Aviation Authority to support member airlines through regular coordination and stakeholder engagement, aiming to minimize disruption during this period. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

GUATEMALA: UPDATE ON AIRPORT DEVELOPMENT ROUNDTABLE

IATA participated in a public-private roundtable on airport development, led by President Bernardo Arévalo. The President outlined key priorities for La Aurora International Airport (GUA) through 2026, including runway maintenance, jet bridge replacement, and acquisition of a new fire engine. He also expressed interest in updating the airport's master plan. A non-refundable USD 700K grant from the World Bank will support urgent investments, with procurement expedited via the UNOPS mechanism. Additionally, a USD 250 million loan is under negotiation to strengthen the national airport system. On the legislative front, the government is consulting with relevant entities to advance bills updating civil aviation law and establishing a new airport administrator. Airport charges, unchanged since 2002, are also under review. For details, contact IATA's Area Manager for Central America, [David Hernandez](#).

UNITED STATES: EXECUTIVE ORDER SUSPENDS DUTY-FREE DE MINIMUS TREATMENT

On July 30, President Trump signed [Executive Order 14324](#) which eliminates the de minimis exemption for low-value imported goods, a trade provision that previously allowed packages valued under \$800 to enter the U.S. duty-free. Effective August 29, the Order mandates that all such shipments (including mail)—regardless of origin—will now be subject to tariffs based on value and country of origin. Congress included a permanent repeal of the de minimis exemption in the One Big Beautiful Bill Act that is scheduled to take effect on July 1, 2027. The Trump Executive Order moves this timeline up. For more details, contact IATA's Assistant Director, Member & External Relations, North America, [Chad Heflin](#).

ICAO: SUMMARY OF NACC DIRECTORS MEETING IN SANTO DOMINGO

IATA joined the 13th ICAO NACC Regional Directors Meeting in Santo Domingo, engaging with Civil Aviation Authorities, regional organizations, and partners on safety, connectivity, and environmental priorities. IATA presented 13 Working Papers aligned with its ICAO Assembly submission, including two focused on CAAF/3, LTAG, and CORSIA. Discussions also addressed the Global Solidarity Levy Task Force's proposal to impose aviation taxes for climate funding. IATA cautioned that such levies could raise ticket prices, reduce connectivity, and harm tourism-dependent economies like Barbados and Antigua. In a dedicated meeting, Barbados's CAA requested IATA to prepare an economic impact analysis to support its briefing to the Prime Minister ahead of COP30, citing challenges in generating CORSIA Eligible Emissions Units. IATA will continue engaging with CAAs to build support for its Assembly positions. All Working Papers were shared with participants and are available via [ICAO's NACC Meetings page](#). For details, please contact IATA's Senior Manager, Sustainability, [Pedro de la Fuente](#) and IATA's Senior Manager, External Affairs, [Alejandro Restrepo](#).

IATA SURVEY ON PARTS MANUFACTURER APPROVAL (PMA) ADOPTION TO ADDRESS SUPPLY CHAIN CHALLENGES

IATA is advancing efforts to address capacity and supply chain challenges in the aviation aftermarket through a dedicated working group exploring the role of alternative materials, including Parts Manufacturer Approval (PMA). To support this initiative, IATA has launched a [brief survey](#) to gather insights on PMA usage across the industry. Aggregated results will be shared with participants.