



Dear Colleagues,

Next week, IATA looks forward to joining States and Civil Aviation Authorities from around the world at the 42nd ICAO Assembly in Montreal, taking place from 23 September to 3 October. As part of our commitment to advancing global aviation, IATA will present 14 working papers addressing key priorities such as sustainable aviation fuel (SAF) production, CORSIA, aviation corporate taxation, consumer protection, radio frequency spectrum, GNSS interference, accident investigations, and pilot age limits. These submissions reflect IATA's focus on safety, sustainability, and efficiency, and aim to reinforce global standards while promoting the practical implementation of existing agreements. You can access more details on all of IATA's working papers [here](#).

Further South, I am pleased to announce the [appointment of Simone Warmbrand Tcherniakovsky](#) as IATA's Country Manager for Brazil, effective September 1st. [Simone](#) brings over two decades of leadership experience in Corporate Affairs, Market Access, Sustainability, and Strategic Communications across Latin America. Simone is based in our São Paulo office, where she will work closely with our airline members operating to, from, and within Brazil, as well as with government stakeholders and fellow industry associations such as ABEAR, JURCAIB, and ALTA to further drive the industry's advocacy efforts in Latin America's largest market.

Looking at the latest industry data, air travel demand across Latin America and the Caribbean soared in [July](#), with Latin American carriers leading the charge, posting a 9.3% year-on-year increase in passenger traffic.

Intra-regional routes were especially strong, signaling robust connectivity and growing consumer confidence. Meanwhile, North American airlines saw a 2.4% rise in demand, though traffic between North and South America dipped slightly by 0.8%. Overall, global demand rose 4.0%, with international travel outpacing domestic growth.

On the air cargo side of the business, global demand maintained its upward trajectory in [July](#), rising 5.5% year-on-year, with international operations leading at +6.0%. In the Americas, Latin American carriers posted a solid 2.4% increase in demand, supported by a 3.8% rise in capacity. In contrast, North American carriers experienced more modest growth at 0.7%, the slowest among all regions, alongside a 0.6% decline in capacity. This slowdown was likely driven by a sharp drop in U.S. e-commerce shipments following the expiration of de minimis exemptions. However, this was partially offset by shippers frontloading goods ahead of anticipated tariff hikes, reflecting growing uncertainty surrounding U.S. trade policy. Despite regional disparities, the overall cargo market remains resilient, signaling steady trade flows and a recovering global supply chain.

As usual, please find below the latest IATA activities across the Americas for your reference, including many new charges announcements across the Caribbean.

Please let me know if you have any questions or suggestions for further action, and thank you for your on-going support.



PETER CERDÁ

REGIONAL VICE PRESIDENT
THE AMERICAS



AIR PASSENGER MARKET

JULY 2025. DETAILS [HERE](#).

JULY 2025 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	4.0%	4.4%	-0.4%	85.5%
Africa	2.2%	3.9%	4.4%	-0.3%	75.1%
Asia Pacific	33.5%	5.5%	5.6%	0.0%	83.2%
Europe	26.7%	2.9%	3.2%	-0.2%	88.0%
Latin America	5.3%	7.2%	7.5%	-0.3%	85.7%
Middle East	9.4%	5.4%	5.9%	-0.4%	83.8%
North America	22.9%	1.9%	3.0%	-1.0%	87.5%

1) % of industry RPK in 2024 2) Year-on-year change in load factor 3) Load Factor Level

AIR CARGO MARKET

JULY 2025. DETAILS [HERE](#).

JULY 2025 (% YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	100%	5.5%	3.9%	0.7%	45.1%
Africa	2.0%	9.4%	-0.1%	4.1%	46.8%
Asia Pacific	34.2%	11.1%	7.3%	1.7%	49.3%
Europe	21.5%	4.1%	4.0%	0.0%	49.5%
Latin America and the Caribbean	2.9%	2.4%	3.8%	-0.4%	33.6%
Middle East	13.6%	2.6%	5.9%	-1.4%	44.6%
North America	25.8%	0.7%	-0.6%	0.5%	39.0%

(*1) % of industry CTKs in 2024 (*2) Year-on-year change in load factor (*3) Load factor level

ARGENTINA: SLOT REGULATION ADVANCED WITH TEMPORARY FRAMEWORK



On August 27, Argentina's Secretary of Transport issued a Transitory Schedule Facilitation Regulation, aligning with key principles of the Worldwide Airport Slot Guidelines (WASG). In effect through October 31, 2025, and expected to extend for at least two scheduling seasons, the regulation introduces structured capacity facilitation processes while a permanent WASG-aligned rule is developed. The framework mandates transparent capacity declarations and stakeholder consultation, with Aeroparque (AEP) designated as a Level 2 airport. Aeropuertos Argentina will serve as the interim slot facilitator under ORSNA's oversight, pending the appointment of an independent facilitator. A detailed activity calendar is forthcoming via Annex 1 of the regulation. IATA and member airlines will work to ensure fair and transparent implementation. For more details, please contact IATA's Assistant Director, External Affairs, Latin America & The Caribbean, [Alejandro Munoz](#).

ARUBA: 2026 AIRPORT CHARGE ADJUSTMENT



The Aruba Airport Authority has issued formal notice of a 0.6% increase in airport charges, effective January 1, 2026. The adjustment, based on the latest cost-of-living index published by the Government of Aruba, complies with Article 12.3 of the Airport Charges Regulations and applies to rates listed in Appendices 2 and 3. This annual update ensures alignment with economic indicators and regulatory standards. The Authority is currently reviewing passenger growth and financial metrics for 2026, which may influence final rates. Airlines are advised to notify their finance teams and prepare accordingly. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

BOLIVIA: REPATRIATION OF FUNDS BACKLOG CLEARED



Following sustained engagement with local stakeholders, IATA successfully facilitated the full clearance of the funds repatriation backlog in Bolivia via ICCS in August 2025. The market has now returned to more standardized operations, with payment execution speeds averaging 1–2 days. This marks a significant improvement in financial flows for international carriers operating in the country. IATA continues to closely monitor the situation to ensure stability and support ongoing operational efficiency. For more information, please contact IATA's Area Manager for Peru & Bolivia, [Martín La Rosa](#).

BONAIRE: BON IMPLEMENTS SECOND CONSECUTIVE TARIFF INCREASE



Bonaire International Airport (BON) has announced a second straight year of tariff increases, effective January 1, 2026. Charges, including landing fees, passenger facility charges, and security service fees, will rise by approximately 3–4%, following hikes of up to 10% in 2025. The airport attributes the adjustments to inflation, rising operational costs, and ongoing infrastructure investments. IATA has acknowledged the notice and requested clarification on whether airlines were consulted in line with ICAO Document 9082 principles. Further context has also been sought regarding the rationale for consecutive increases and whether they form part of a broader adjustment plan. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

CANADA: NAV CANADA APPROVES FY2026 BUDGET WITH NO CHANGES TO USER FEE RATES



IATA participated in NAV CANADA's follow-up meeting on its FY2026 charging strategy. The session included updates on the upcoming fiscal year's budget and air traffic forecast. Notably, NAV CANADA's Board has approved the FY2026 budget with no changes to user fee rates, providing stability and predictability for carriers operating in the region. IATA continues to engage closely with stakeholders to ensure transparency and alignment on cost recovery and service delivery. For more details, please contact IATA's Area Manager for Canada and the US, [Ben Barrocas](#).

CHILE: INDUSTRY PUSHBACK ON PROPOSED INTERNATIONAL DEPARTURE FEE INCREASE



In response to the Chilean government's proposal to raise international departure fees by US\$5—from US\$25 back to US\$30 for flights over 500 km—IATA and the Chilean Airline Association (ACHILA) voiced strong opposition, calling it a direct tax on passengers. Boarding fees should be managed transparently and used exclusively to cover airport service costs, not as a general revenue source. We urged authorities to engage in direct dialogue with the industry to assess the impact and explore balanced solutions that support aviation funding while preserving affordable and competitive air travel. For more details, please contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).

CHILE: CONFIRMED WHEELCHAIR SERVICE POLICY AT SCL AIRPORT SHIFTS RESPONSIBILITY & COST TO AIRLINES



Effective December 1, 2025, airlines operating at Santiago's Arturo Merino Benítez International Airport (SCL) will assume full responsibility, and cost, for providing wheelchair assistance from the gate to the aircraft. This change follows confirmation from both the Chilean government and the airport concessionaire. While the industry has advocated for a unified service model covering the entire passenger journey from curbside to aircraft door, existing legal provisions in the concession contract prevent such integration. The shift raises operational and financial concerns for carriers, particularly regarding service consistency and cost allocation. For more details, please contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).

COLOMBIA: IATA OPPOSES PROPOSED CARBON TAX AND JET FUEL VAT INCREASES



On September 1, the Colombian government introduced a sweeping tax reform bill in Congress that includes a 300% increase in the domestic carbon tax by 2027 and a significant rise in VAT on jet fuel. These measures would substantially raise operating costs for domestic air travel, with no commitment to reinvest the revenues in environmental initiatives or support the sector's energy transition efforts led by the Ministry of Mines and Energy. IATA submitted formal comments opposing the carbon tax increase, citing its disproportionate impact on aviation and lack of transparency. We continue to maintain discussions with legislators and currently estimate a low probability of the reform being approved. For details, contact IATA's Country Manager for Colombia, [Paula Bernal](#).

PERU: INDUSTRY PUSHBACK ON NEW IN-TRANSIT FEE AT LIM



IATA continues efforts to prevent the implementation of a new TUUA (in-transit passenger fee) at Lima International Airport (LIM), proposed by airport operator LAP and scheduled to take effect in the coming weeks. IATA recently met with Peru's Minister of Transport to express industry concerns that this fee, introduced without transparent economic justification, would undermine LIM's competitiveness against regional hubs like Bogotá (BOG) and Panama (PTY), which do not charge similar fees. Congressional representatives and other officials present shared the industry's concerns and urged the Minister to seek alternatives that support tourism and commercial growth. He committed to an urgent meeting with the Minister of Economy to explore solutions, including a possible addendum to LAP's concession. For more information, contact IATA's Area Manager for Peru & Bolivia, [Martín La Rosa](#).

MEXICO: SLOT USAGE RULE ALIGNED WITH GLOBAL STANDARDS



Mexico has officially adopted the 80/20 slot usage rule, replacing its previous 85/15 regulation and aligning with the Worldwide Airport Slot Guidelines (WASG). Published in the Official Gazette, the Decree also expands the definition of "new entrant" from five to seven slots, clarifies slot exchange and transfer procedures, and strengthens the role of the Coordinator in line with international best practices. The regulation takes immediate effect, with AFAC given 30 days to update the Bases Generales. IATA continues to engage with authorities to confirm the implementation timeline, expected to begin Winter 2025/26, and to advance remaining WASG-aligned reforms. A follow-up letter has been sent to the Secretary of Transport, encouraging further collaboration to improve slot management and urgently needed infrastructure upgrades at Mexico City International Airport (MEX). For more details, please contact IATA's Assistant Director, External Affairs, Latin America & The Caribbean, [Alejandro Munoz](#).

UNITED STATES: DOT OUTLINES FIRST PHASE OF REGULATORY RELIEF



The U.S. Department of Transportation recently released its updated Unified Regulatory Agenda which outlines the near- and long-term regulatory actions the Department plans to take. Proposed actions include a withdrawal of the advance notice of proposed rulemaking on passenger compensation and modifications to existing rules on refunds, the display of ancillaries, and full-fare advertising. Planned long-term actions include modifications to the proposed rule on family seating and the existing rule on wheelchairs. With the exception of withdrawing the passenger compensation proposal, the other changes will need to be achieved through new rulemakings, which will likely not be accomplished until 2026 at the earliest. However, IATA is pleased that aviation is a central component of the overall Trump Administration deregulation program. For more details, contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

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



As noted in last month's America's Focus, effective 29 August 2025, the \$800 de minimis exemption for all shipments to the US, including international mail, has been removed. Airlines are now specifically required to collect and remit the duties for all international mail they transport to the US. However, in order to avoid this burden and liability, carriers are permitted to utilize qualified third-party entities to collect and remit the duties. CBP has issued [guidance](#) and is maintaining a list of [qualified third-party entities](#). For more details, contact IATA's Assistant Director, Member & External Relations, North America, [Chad Heflin](#).