

Dear Colleagues,

Given the latest geopolitical developments in the Middle East, safety remains top of mind for airlines and passengers alike, and the industry's number-one priority. IATA has just released its [2025 Annual Safety Report](#), which shows a solid year of global safety performance, including an improved all-accident rate of 1.32 per million flights, down from 1.42 in 2024, alongside detailed insights into accident types, regional trends, and emerging risks such as conflict-zone exposure and a sharp rise in GNSS interference. Please access the full [interactive report](#) to explore the key findings, regional safety performance, and priority actions shaping aviation safety in 2026 and beyond.

The conflict in the Middle East has also led to a steep increase in oil prices, putting immediate pressure on airlines as jet fuel is the highest cost for airlines (along with labor), and fluctuations in fuel prices have an important effect on the airline industry's profitability. However, the pace of change tends to matter more than the price level. Rapid changes qualify as shocks and are hard to adjust to. IATA released [this analysis](#) for a detailed historical comparison.

Focusing in on the Americas, we just concluded a successful [World Cargo Symposium](#) in Lima, Peru. As part of the event, IATA launched a [case study](#) to showcase the powerful role air cargo plays in Peru's booming fresh-produce and flower sectors. The report is also available in [Spanish](#) and we will continue to release similar briefs to highlight how aviation supports economies and communities throughout the region. In Chile, I met with the newly inaugurated government, including key ministries responsible for

transport, infrastructure, and tourism to outline the aviation industry's priorities and agree on a collaborative path forward. These engagements come at an important moment as we prepare for [Wings of Change Americas](#) in Santiago on 8–9 April, where strengthened cooperation between industry and government will be essential to advancing regional connectivity and competitiveness. You can view the latest [agenda](#) here and I hope you will be able to [join us](#) next month.

From an economic perspective, international passenger demand rose 5.9% year-on-year in [January](#), with all regions expanding, while North American carriers posted steady growth of 3.4% and an improved 82.3% load factor, and Latin American airlines saw a 11.4% surge in demand, outpacing capacity growth and achieving the world's highest load factor at 86.5%, underscoring the region's continued strength.

On the cargo side of the business, international air cargo demand grew 5.6% year-on-year in [January](#). North America saw a slight 0.5% decline alongside the only regional capacity contraction (-0.2%). Latin America and the Caribbean posted the weakest demand result worldwide with a 2.0% decrease despite a 2.3% rise in capacity, highlighting a mixed global cargo environment with sharp regional divergences.

As always, please find below the latest IATA activities across the Americas region, and do not hesitate to reach out with any questions or suggestions for further follow-up.



PETER CERDÁ

REGIONAL VICE PRESIDENT
THE AMERICAS



AIR PASSENGER MARKET IN DETAIL – JANUARY 2026

DETAILS [HERE](#).

JANUARY 2026 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	3.8%	3.5%	0.2	82.0%
Africa	2.2%	17.9%	16.3%	1.0	77.0%
Asia Pacific	34.4%	1.4%	1.8%	-0.3	83.9%
Europe	26.7%	6.0%	5.1%	0.7	80.2%
Latin America and the Caribbean	5.4%	8.3%	6.0%	1.8	85.3%
Middle East	9.5%	7.4%	8.0%	-0.5	83.3%
North America	21.8%	0.8%	0.1%	0.5	80.2%

1) % of industry RPK in 2025 2) Year-on-year change in load factor 3) Load Factor Level

AIR CARGO MARKET IN DETAIL – JANUARY 2026

DETAILS [HERE](#).

JANUARY 2026 (% YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	100%	5.6%	3.6%	0.9	45.1%
Africa	2.1%	18.2%	6.5%	4.3	43.5%
Asia Pacific	35.9%	7.8%	3.3%	1.9	45.3%
Europe	21.4%	6.9%	4.9%	1.0	54.1%
Latin America and Caribbean	2.9%	-2.0%	2.3%	-1.4	32.0%
Middle East	13.2%	9.3%	9.9%	-0.2	40.6%
North America	24.5%	-0.5%	-0.2%	-0.1	43.3%

(*1) % of industry CTK in 2025 (*2) Year-on-year change in load factor (*3) Load factor level

ARGENTINA: EZEIZA MODERNIZATION PROGRAM TO RESULT IN TEMPORARY RUNWAY CONSTRAINTS FOR AIRLINES

Aeropuertos Argentina has unveiled a USD 100 million modernization program for Ezeiza International Airport (EZE), targeting both airside and terminal infrastructure. The initiative includes rehabilitation of runway 17/35, upgrades to its intersection with the main runway, expanded aircraft parking, improved lighting and taxiways, and significant enhancements to domestic arrivals, terminal technology, and cargo facilities. The most notable operational impact will occur 25 October to 11 November 2026, when all traffic shifts to runway 11/29, temporarily reduced to 1,850 meters, prompting airlines operating larger aircraft to adjust fleet and flight schedules. IATA is working closely with Aeropuertos Argentina and national authorities to coordinate planning, reduce disruption, and ensure airlines receive timely operational guidance as details are finalized. For more details, please contact IATA's Area Manager for Argentina, Paraguay and Uruguay, [Maria Jose Taveira](#).



BRAZIL: IATA SUBMITS INDUSTRY POSITION ON ANAC'S PROPOSED CHANGES TO RESOLUTION 400

On 9 March, IATA submitted comments to ANAC's public consultation on proposed amendments to Resolution 400, Brazil's air passenger rights regulation. The submission followed a detailed review coordinated with ABEAR, JURCAIB, ALTA, and member airlines, with industry stakeholders agreeing that the consultation provides an important opportunity to strengthen the regulatory framework and reduce litigation exposure. IATA's comments also included a joint communication to ANAC outlining key priorities, including clarifying the regulatory scope, enhancing fare transparency, establishing a 24-hour window for passenger data correction, updating baggage provisions, and ensuring clear rules on the prohibition of non-sequential coupon use. IATA will continue to monitor the regulatory process and engage with ANAC as the consultation advances. For more details, please contact IATA's Assistant Director, External Affairs, Latin America & The Caribbean, [Alejandro Munoz](#).



BRAZIL: INDUSTRY SEEKS CLARITY AS GOVERNMENT FINALIZES E-INVOICE MANDATE



IATA continues to highlight key industry concerns as Brazil moves toward implementing its 2026 e-invoice compliance mandate. Uncertainty remains around several essential components, including the pending CBS/IBS rules, the still-unreleased BPe Technical Specifications, and Receita Federal's lack of response to multiple industry submissions, most recently a letter outlining data-privacy concerns. IATA is urging airlines to accelerate internal preparations despite these outstanding gaps, given the short timeline for compliance. To strengthen government engagement, IATA and ALTA have also retained a new advocacy firm in Brazil and we will continue to coordinate an industry position, advance technical work through a dedicated task force, and press authorities for the clarity and regulatory stability needed before the government issues the final implementation resolution. For more details, please contact IATA's Country Manager for Brazil, [Simone Tcherniakovsky](#).

CANADA: IATA BACKS NACC'S CALL FOR MORE COMPETITIVE AVIATION COST FRAMEWORK



IATA has expressed full support for the National Airlines Council of Canada (NACC) in urging the Government of Canada to adopt policies that would lower aviation costs and improve the country's competitiveness. NACC's study, [Ready for Takeoff: The Economic Case for Reducing Aviation Costs in Canada](#), reinforces long-standing concerns that excessive third-party fees, charges, and taxes across the aviation value chain increase travel costs and inhibit sector growth. IATA continues to advocate for policy reforms that reduce structural aviation costs, such as revising crown rent, and for a shared-accountability approach among all aviation stakeholders to improve the passenger experience. With Canada redefining its economic and trade agenda, IATA emphasizes that this is an opportune moment to enable further aviation growth, particularly as carriers adapt to shifting demand and expand domestic and international connectivity. For details, contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

COLOMBIA: DGAC COMMITS TO WASG COMPLIANCE AND ENHANCED SLOT MONITORING AT EL DORADO



On 3 March, IATA met with the Director of Colombia's Civil Aviation Authority (DGAC) to review slot management procedures at El Dorado Airport (BOG). The meeting secured confirmation of measures that will strengthen regulatory stability and operational efficiency at the country's main international hub. DGAC publicly announced that it will adhere fully to the Worldwide Airport Slot Guidelines (WASG) for slot use at El Dorado and will introduce a formal monitoring system to ensure compliance. The authority later issued an official communication reaffirming these commitments, representing a meaningful step toward alignment with international standards and greater predictability for airlines operating in Bogotá. For more details, please contact IATA's Assistant Director, External Affairs, Latin America & The Caribbean, [Alejandro Munoz](#).

COSTA RICA: SJO ANNOUNCES 2026-2027 CHARGE UPDATE WITH OVERALL REDUCTIONS FOR AIRLINES



San José International Airport (SJO), operated by AERIS, released its 2026-2027 aeronautical charge update on 11 March 2026. Higher than expected traffic, 8% above forecast, combined with operational efficiencies allowed the airport to lower several charges. The infrastructure charge will drop 15%, aircraft parking fees will decrease 2.44%, and other charges (including landing, approach, boarding bridges, and airfield lighting) will see only a small 0.87% increase. For a typical reference operation, an airline's total aeronautical cost will decrease by USD 4.86 (or USD 5.30 including parking). These outcomes align with the airport's concession extension through 2036 and the ongoing USD 390 million expansion program. IATA participated in the process, coordinating airline input and preparing the industry's position. For details, contact IATA's Senior Manager Airport & ANSP Charges, [Guillermo Rodriguez](#).

DOMINICAN REPUBLIC: SDQ RUNWAY 17/35 REOPENING POSTPONED TO 31 MAY 2026



The planned reopening of Runway 17/35 at Santo Domingo International Airport (SDQ) has been postponed to May 31, 2026. The extension of the closure period is linked to ongoing operational and infrastructure works. IATA is organizing a meeting with airport authorities and operating airlines to provide an update on the project timeline and the expected operational impacts. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

GUATEMALA: PROPOSED FILM INDUSTRY BILL WOULD IMPOSE NEW TAX ON AIRFARES



The Congress of Guatemala is considering legislation to promote the national film industry that would impose a US\$1 surcharge on all tickets sold to foreign passengers traveling to Guatemala, with proceeds funding the newly created Guatemalan Film Institute. The proposal introduces a tax directly tied to air travel, raising concerns about its impact on Guatemala's competitiveness, connectivity, and cost structure. IATA, together with ALTA and the Guatemalan Airline Association (AGLA), issued a public statement outlining the measure's negative consequences for the country's aviation and tourism sectors, and met with the bill's sponsor in Congress to explain the industry's opposition and underscore the need to identify alternative funding mechanisms that do not burden travelers or undermine the sector's growth potential. For more details, please contact IATA's Area Manager for Central America, [David Hernandez](#).

JAMAICA: JCAA PROPOSES NEW HYBRID EN ROUTE CHARGING MODEL



The Jamaica Civil Aviation Authority (JCAA) has proposed replacing its three-tier flat en-route fee with a hybrid model combining MTOW-based tiers and a distance-based charge. The change would affect airlines differently: Shorter sectors may see little or no increase, while longer flights could face higher costs. IATA requested clarification on the planned investments, cost-allocation methods, and assurances that terminal or approach costs will not be included in en-route charges. JCAA plans to finalize the model by 1 April and implement it on 1 September 2026. For more details, contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

PARAGUAY: API-PNR IMPLEMENTATION PLAN LAUNCHED TO STRENGTHEN BORDER CONTROLS



The National Directorate of Migration (DNM) has announced the launch of Paraguay's "Implementation Plan of the API-PNR System for Aviation Facilitation and Security", mandated under Decree 4183/2025. The project, developed jointly with and financed by the Civil Aviation Authority (DINAC), will introduce a new API/PNR data system alongside biometric terminals to enhance passenger identification, verification, and risk-analysis processes. IATA met with both agencies to review the technical specifications required for implementation. The initiative aims to modernize immigration controls and fully align national procedures with ICAO international security standards. For more details, please contact IATA's Area Manager for Argentina, Paraguay and Uruguay, [Maria Jose Taveira](#).

TRINIDAD AND TOBAGO: ONLINE ARRIVAL & DEPARTURE CARD TO BECOME MANDATORY ON 17 MARCH 2026



Effective 17 March 2026, Trinidad and Tobago will fully transition to a mandatory Online Arrival and Departure (AD) Card Platform, replacing the paper-based system. All passengers traveling to or from the country must complete the electronic form at www.travel.gov.tt within 72 hours of arrival or departure, using the same passport that will be presented at the border. Upon submission, travelers will receive a digital receipt with a unique code and QR code, which must be shown, electronically or printed, on arrival. Airlines are requested to ensure passengers comply with the new requirement before travel. IATA has reached out to national authorities to seek clarification on several operational aspects and will provide further updates as additional guidance becomes available. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

UNITED STATES: INDUSTRY SEEKS EXTENDED DEADLINE AND REVISED COST ESTIMATES IN FAA 5G RULEMAKING



On March 9, 2026, IATA joined the broad industry response to the FAA 5G NPRM. The comments called for an extension of the January 2028 voluntary telecom migration deadline to give industry the time to design retrofits or replacements for existing radio altimeters to avoid interference from the deployment of upper C band based 5G services. The comments also challenged FAA's \$4.49B estimate for the cost of the retrofit, arguing it could cost as much as \$7B. For details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).