

Dear Colleagues,

The global energy crisis continues despite the recently announced ceasefire, with aviation already experiencing tangible impacts as some flights are cancelled and aircraft grounded. While the industry is working intensively to secure alternative supply routes, it is essential that governments also fully understand the implications of the current fuel situation for airlines and have clearly communicated, well-coordinated contingency plans in place should conditions deteriorate further in terms of supply and price, as recently outlined by the International Energy Agency. This includes preparedness for potential rationing measures, such as slot relief, given aviation's critical role in supporting connectivity, economic activity, and social cohesion, for which few viable alternatives exist.

This issue was also front and center on and off the stage at Wings of Change Americas 2026 that took place in Santiago, Chile at the beginning of April. The event brought together 400 voices from across the region, governments, industry leaders, and international partners, around a shared commitment to aviation's future.

We were particularly encouraged by the strong participation of Chile's new government, ministries from across the Americas, and key partners including ICAO, the FAA, EASA, and CLAC. Discussions reinforced a clear message: aviation is a strategic enabler of economic growth, connectivity, and social development, and addressing today's geopolitical, cost, and sustainability challenges will require smart policy, close collaboration, and a continued focus on people and trust at the center of the system.

All event materials, including presentations, press releases, and images, are available [here](#).

Looking at the latest passenger data, global air travel demand continued to strengthen in [February](#), with worldwide passenger traffic up 6.1% year-on-year. Latin America stood out as one of the strongest performers, with demand growth of 9.2% overall and a surge of 13.5% in international traffic, supported by capacity expansion and industry-leading load factors around 85%, highlighting sustained momentum in the region. North America, by contrast, showed more moderate growth, with total demand up 2.8% and international traffic rising 5.0%.

On the cargo side of the business, worldwide demand in [February](#) rose 11.2% year-on-year, supported by solid global trade growth, improving manufacturing sentiment, and pre-Lunar New Year shipping activity. North America recorded robust and well-balanced growth, with cargo demand up 9.4% and capacity rising a more modest 5.3%. Latin America posted just 0.7% growth in demand while capacity grew 4.5%, leading to declining load factors and highlighting a softer cargo market relative to both the global average and North America's stronger momentum.

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 – FEBRUARY 2026

[DETAILS HERE.](#)

FEBRUARY 2026 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	6.1%	5.6%	0.3	81.4%
Africa	2.2%	11.9%	13.1%	-0.8	75.0%
Asia Pacific	34.5%	9.1%	9.0%	0.1	85.5%
Europe	26.6%	4.9%	4.3%	0.4	76.9%
Latin America and the Caribbean	5.4%	9.2%	6.2%	2.3	84.0%
Middle East	9.5%	0.8%	3.9%	-2.5	79.5%
North America	21.8%	2.8%	1.1%	1.3	80.3%

AIR CARGO MARKET IN DETAIL – FEBRUARY 2026

[DETAILS HERE.](#)

FEBRUARY 2026 (% YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	100%	11.2%	8.5%	1.1	46.0%
Africa	2.1%	21.0%	17.3%	1.3	43.8%
Asia Pacific	36.0%	13.6%	10.1%	1.4	45.5%
Europe	21.3%	6.9%	6.1%	0.4	59.1%
Latin America and Caribbean	2.9%	0.7%	4.5%	-1.3	35.2%
Middle East	13.2%	16.5%	13.5%	1.1	44.4%
North America	24.5%	9.4%	5.3%	1.5	41.1%

ARGENTINA: IATA CHALLENGED PROPOSED AIR NAVIGATION FEE INCREASES

IATA has formally challenged Argentina's air navigation services provider, EANA, over the absence of prior consultation with airline users in the context of ongoing considerations related to potential air navigation charge increases, noting that this approach is inconsistent with ICAO policies requiring charges to be cost based, nondiscriminatory, transparent, and supported by effective consultation before any decision is taken or implemented. This follows a 22.3% increase applied to international flights in 2024, which was also imposed without consultation and led to explicit assurances from EANA that future pricing determination processes would involve the industry, making the current approach inconsistent with those commitments. While IATA recognizes and supports broader government led reforms aimed at strengthening Argentina's aviation sector, it has urged the authorities to urgently initiate a formal consultative process to review cost assumptions, planned investments, and the proportionality of any future increases. For more details, please contact IATA's Senior Manager Airport & ANSP Charges, [Guillermo Rodriguez](#).



ARGENTINA: TENDER LAUNCHED FOR FULL PRIVATIZATION OF INTERCARGO

Argentina's Ministry of Economy has authorized the launch of a national and international public tender for the full privatization of Intercargo S.A.U., the country's leading provider of ground handling services. The decision, formalized through Resolution 282/2026, marks a significant step in the government's efforts to modernize airport operations and improve efficiency by opening the company to private investment. The tender is open to both domestic and foreign bidders that can demonstrate the required technical expertise and financial capacity to operate in a critical segment of airport services. Authorities view the initiative as a key milestone in the broader restructuring of Argentina's aviation and airport services framework. Interested parties may submit inquiries regarding the process until 27 April 2026, with bids due by 7 May 2026. For more details, please contact IATA's Area Manager for Argentina, Paraguay and Uruguay, [Maria Jose Taveira](#).



BRAZIL: INDUSTRY URGED STRUCTURED TALKS ON TAX REFORM AND INVOICING CHANGES

IATA, together with Brazilian and regional associations, continues to engage the Brazilian government to seek clarity on the tax reform implementation, specifically to mitigate the operational, technical and legal risks associated with the mandatory BPe TA electronic invoicing framework. On 31 March, IATA, BRATA and other industry associations formally submitted a joint letter to Receita Federal warning that the current BPe implementation plan raises significant concerns, including system readiness, legal uncertainty and data protection risks for international air transport. Despite repeated and formal follow-up communications, no substantive response has been received to date. As a result, IATA is intensifying its engagement, including outreach at the diplomatic level, to encourage the establishment of a structured dialogue and clearer guidance on scope, timelines and treatment of international operations. For more details, contact IATA's Manager, External Affairs, Latin America & The Caribbean, [Alejandro Restrepo](#).



Receita Federal

BRAZIL: GOVERNMENT LAUNCHED 'AGENDA CONECTAR' TO BOOST AIR CONNECTIVITY

Brazil's Ministry of Ports and Airports (MPOR) launched Agenda Conectar on March 24 in Brasília, a comprehensive government initiative aimed at improving air transport connectivity across the country, with institutional support from IATA and other key industry players. The agenda brings together government and industry stakeholders to expand access to air transport, reduce costs and enhance service offerings for users, while strengthening the competitiveness of Brazil's aviation sector. The initiative focuses on addressing structural challenges, including the high cost of jet fuel (QAV), legal and regulatory uncertainty, and logistical bottlenecks affecting airline and airport operations. IATA welcomed Agenda Conectar as a constructive platform for collaboration and reaffirmed its commitment to supporting policies that foster a more efficient, competitive and sustainable aviation sector in Brazil. For more details, please contact IATA's Country Manager for Brazil, [Simone Tcherniakovsky](#).



MPOR

CANADA: IATA URGED ONTARIO TO SUSPEND AVIATION FUEL TAX AS COST PRESSURES MOUNT

IATA has called on the Government of Ontario to suspend the Aviation Fuel Tax on flights departing the province, arguing that immediate relief is needed to offset a sharp rise in global jet fuel prices driven by the conflict in the Middle East. IATA cautioned that airlines cannot absorb further increases without negative impacts on airfares, regional connectivity, and the broader economy. We also noted that while the federal government has temporarily suspended the federal aviation fuel excise tax until September 2026, Ontario continues to levy one of Canada's highest aviation fuel taxes and remains the only province applying an excise tax to international flights. Suspending the provincial tax would help limit fare increases while protecting trade, tourism, and supply chains. For more details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).



Ontario

CHILE: SANTIAGO AIRPORT RUNWAY WORKS PROCEED WITH LIMITED OPERATIONAL IMPACT

Planned construction works on the runways at Santiago International Airport will begin on 15 April, starting with runway 17 and continuing through 30 June. No operational impact is expected during this phase, as flight operations will continue primarily on runway 17R, which will remain fully available and unrestricted. The most operationally complex period is expected between 21 September and 3 November, when works commence on runway 17R. Initial plans would have limited operations to runway 17L, with weight restrictions affecting widebody aircraft. However, following coordination with authorities, runway 17R will remain available for nighttime operations. In addition, a waiver has been granted for runway 17L, allowing heavier aircraft operations than normally permitted, covering most widebody flights outside nighttime hours. IATA continues to work closely with authorities to mitigate impacts on remaining operations. For more details, please contact IATA's Assistant Director, Airport Development, [Sandra Gonzalez](#).



AEROPUERTO SANTIAGO DE CHILE

COLOMBIA: RESOLUTION ISSUED UPDATING SARLAFT COMPLIANCE REQUIREMENTS

Following industry engagement, Colombia's Superintendence of Transport has issued [Resolution 4607](#) on April 9, amending Chapter 6 of Title V of the Single Transport and Infrastructure Circular to refine and modernize the SARLAFT framework covering anti-money laundering, counter-terrorism financing, and proliferation financing. The resolution introduces a more proportionate, risk-based approach, clarifies key definitions, and establishes a simplified compliance regime for smaller or lower-risk entities, while reinforcing requirements related to suspicious transaction reporting and compliance governance. For airlines, the resolution confirms flexibility for foreign carriers regarding the domicile of Compliance Officers and sets a six-month transition period for implementation where applicable. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).



MEXICO: ENGAGEMENT ON NEW DIGITAL PLATFORM TAX RULES

IATA is actively engaging with Mexican authorities regarding recent regulatory changes affecting digital platforms and the associated tax withholding obligations. As part of this advocacy, IATA has submitted a formal communication to the head of the Servicio de Administración Tributaria (SAT), outlining the aviation industry's key concerns. In parallel, we have sought support from the Ministry of Infrastructure, Communications and Transport (SICT) as the sector's lead authority, while also coordinating with stakeholders including the American Chamber of Commerce of Mexico and the U.S. Embassy to ensure broader alignment. While an informal extension of the implementation timeline is anticipated, significant uncertainties remain. These include the scope of data requested by SAT, the mechanisms for accessing such information, and the adequacy of data protection safeguards. IATA will continue its advocacy efforts until regulatory clarity and a workable outcome for the industry are achieved. For more details, please contact IATA's Country Manager for Mexico, [Cintya Martinez](#).



SAT

PANAMA: LAWMAKERS DROP PROPOSED INCREASE IN MANDATORY AIRFARE DISCOUNTS

On April 7, the Labor Commission of Panama's National Assembly approved, at first debate, a bill proposing increased statutory discounts for senior citizens and retirees across a range of services. An earlier draft of the legislation sought to raise the mandatory discount on domestic and international airfares from 25% to 30%. Following engagement with the aviation industry during the Commission's deliberations on March 30, however, lawmakers opted not to advance the proposal to further increase airfare discounts. As a result, the existing 25% discount for air transport remains unchanged at this stage. The bill now moves forward in the legislative process without amendments affecting aviation fares. IATA will continue to closely monitor developments as the proposal advances to plenary consideration. For more details, please contact IATA's Area Manager for Central America, [David Hernandez](#).



UNITED STATES & VENEZUELA: LIFTING OF FLIGHT SUSPENSION, SERVICE TO RESUME END OF APRIL

On April 7, IATA submitted a formal letter to the U.S. Department of Transportation and the U.S. Department of State outlining the challenges faced by member airlines seeking to start or resume air services to Venezuela. Among the key barriers highlighted were the impact of current U.S. sanctions and export control requirements, heightened currency and financial risks, and the need for a transparent and predictable permitting process. On April 17, the U.S. government rescinded its 2019 suspension of passenger and cargo flights between the United States and Venezuela. A Department of Homeland Security [notice](#), retroactively effective to 15 April 2026, followed a corresponding rescission issued earlier this year by the Department of Transportation. As a result, direct flights between the two countries are expected to be reestablished in the coming weeks. IATA will continue engaging with U.S. authorities to help ensure that remaining regulatory and operational barriers are addressed to support air connectivity between the two countries. For details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).



U.S. DEPARTMENT OF STATE