

Dear Colleagues,

We are now less than a month away from the global aviation spotlight turning to the Americas region, Brazil in particular. The [IATA Annual General Meeting \(AGM\)](#) in Rio de Janeiro, taking place from 6–8 June, is offering a unique platform to highlight key regional priorities and the structural challenges facing Brazil's aviation sector to a global audience.

By convening in South America's largest aviation market, the event will underscore aviation's critical role as a driver of connectivity, tourism, trade, and broader economic development. I look forward to seeing many of you in Rio and please do not hesitate to reach out with any questions.

One of the critical topics under scrutiny is the current jet fuel crisis which continues to test the resilience of global aviation. It has once again become clear that governments must work closely with the industry, avoid short-term policy mistakes, and instead focus on strengthening connectivity and long-term resilience. Reliable air connectivity is essential not only to support economic growth, but also to promote social inclusion and enable access to global markets, particularly for smaller, remote, and underserved communities where aviation often serves as a critical lifeline.

To support informed, evidence-based policymaking, IATA has launched the [Regional Connectivity Snapshots](#), offering a concise, data-driven view of how regional air route networks are evolving across selected markets. Designed for policymakers and industry stakeholders, the snapshots track changes in network structure, capacity, and airline

presence over time, shedding light on both the resilience and vulnerability of regional air services and helping to inform policies that support sustainable, affordable, and inclusive aviation connectivity. We hope you find the [reports](#) useful in your own advocacy efforts and stakeholder engagement.

Looking at the latest [passenger data](#), air passenger demand in the Americas showed resilient growth in March 2026 despite global headwinds. North American carriers reported a 3.7% increase in passenger demand, achieving a strong load factor of 85.5%, while Latin America and the Caribbean posted even stronger growth, with demand rising 12.1% year on year and a load factor of 83.8%, underscoring solid traffic momentum and high aircraft utilization across both regions.

On the [air cargo](#) side of the business, performance in the Americas was mixed in March 2026 amid global disruptions. North American carriers recorded a 1.2% year-on-year decline in cargo demand, with a cargo load factor of 40.6%, reflecting softer volumes but stable utilization. In contrast, Latin America and the Caribbean saw cargo demand grow by 1.8% year on year, although the load factor stood at a more modest 38.3%, pointing to continued demand growth alongside expanding capacity across the region.

As always, please find below the latest IATA activities across the Americas region. Please 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 – MARCH 2026

[DETAILS HERE.](#)

MARCH 2026 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	2.1%	-1.7%	3.1	83.6%
Africa	2.2%	20.6%	10.3%	6.5	76.2%
Asia Pacific	34.5%	11.5%	6.0%	4.3	87.2%
Europe	26.6%	7.5%	3.3%	3.2	82.1%
Latin America and the Caribbean	5.4%	8.4%	5.5%	2.3	83.1%
Middle East	9.5%	-58.6%	-54.7%	-6.3	68.3%
North America	21.8%	2.3%	0.4%	1.6	83.7%

AIR CARGO MARKET IN DETAIL – MARCH 2026

[DETAILS HERE.](#)

MARCH 2026 (% YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	100%	-4.8%	-4.7%	-0.1	47.9%
Africa	2.1%	7.0%	-4.6%	5.4	49.6%
Asia Pacific	36.0%	5.4%	5.0%	0.2	48.9%
Europe	21.3%	2.2%	4.2%	-1.1	59.9%
Latin America and Caribbean	2.9%	1.8%	5.1%	-1.3	38.3%
Middle East	13.2%	-54.3%	-52.4%	-1.9	45.7%
North America	24.5%	-1.2%	-1.1%	0.0	40.6%

ARGENTINA: INCREASE IN AIR NAVIGATION CHARGES WITHOUT INDUSTRY CONSULTATION

On April 30, Argentina's civil aviation authority, ANAC, approved sharp increases in EANA's air navigation charges through Resolution 265/2026, significantly raising costs for carriers. Overflight and landing fees for international operations will rise by 15%, while domestic charges will surge by 359%. The move has drawn industry concern, not only for its scale but for its timing as it was introduced just three days after a virtual meeting with ANAC, EANA, IATA and the local airline association, during which authorities committed to refrain from increases without prior consultation, consistent with ICAO principles. IATA has formally opposed the measure by issuing a [press release](#) and expressing the industry concerns to the Minister of Finance, urging the suspension of the charges pending proper stakeholder consultation and transparent, cost-based justification. For more details, please contact IATA's Senior Manager Airport & ANSP Charges, [Guillermo Rodriguez](#).



ARGENTINA: SAF FEASIBILITY STUDY HIGHLIGHTS POTENTIAL AND POLICY GAPS

On April 9, Argentina's civil aviation authority, ANAC, presented the results of the country's first sustainable aviation fuel (SAF) feasibility study, launched in May 2025 with technical support from ICAO. The study underscores Argentina's strong potential to develop SAF production and play a meaningful role in regional supply. Industry stakeholders will provide input through the ACT-SAF process, flagging areas that diverge from prevailing global approaches to aviation decarbonization. In particular, feedback will caution against prescriptive measures, such as mandatory SAF off-take requirements, that could undermine connectivity, competitiveness, and long-term scalability. The industry's objective is to promote policy frameworks aligned with ICAO principles that encourage investment and enable SAF growth under economically viable conditions for all stakeholders. For more details, please contact IATA's Senior Manager, Sustainability, The Americas, [Pedro de la Fuente](#).



BRAZIL: AVIATION FORUM ALIGNS STAKEHOLDERS ON SECTOR PRIORITIES

At the Brazilian Aviation Forum held in Brasília on April 23, 2026, IATA co-organized discussions with ANAC and member airlines, convening senior government officials, regulators, airline executives, and industry experts to address key structural and policy challenges. The forum fostered strong alignment across stakeholders on priorities shaping the sector's sustainability, competitiveness, and long-term growth. Key outcomes included broad consensus on the need to strengthen legal certainty and curb excessive litigation, a significant cost driver affecting fares and investment. Participants underscored tax reform as critical to affordability, demand stimulation, and connectivity. Discussions also highlighted the importance of regulatory predictability to support investment and fleet renewal, while identifying disruptive passenger behavior as an emerging operational concern. For more details, please contact IATA's Country Manager for Brazil, [Simone Tcherniakovsky](#).



BRAZIL: ON-GOING DIALOGUE ON JUDICIALIZATION IN AVIATION

In partnership with the National School for the Judiciary (ENM) and the Association of Brazilian Magistrates (AMB), IATA co-hosted the 4th Aviation Law Seminar in São Paulo, convening judges, regulators, academics, government officials, and industry leaders to address the growing challenge of judicialization in air transport. The event drew strong national participation, both in person and virtual, and underscored the need for informed institutional dialogue on the economic and regulatory complexities of civil aviation. Discussions focused on the impact of excessive litigation on costs, connectivity, regulatory predictability, and consumer outcomes. IATA contributed global data and comparative analysis to contextualize Brazil's experience and support more balanced approaches. The seminar also explored practical solutions across the judiciary and industry, reinforcing the importance of evidence-based policymaking to ensure connectivity. For more details, contact IATA's Assistant Director, External Affairs, Brazil, [Marcelo Pedroso](#).



CANADA: TRANSPORT CANADA MOVES TO CLEAR COMPLAINT BACKLOG, STRENGTHEN ENFORCEMENT

On May 1, Transport Canada (TC) announced measures to address the growing backlog of passenger complaints handled by the Canadian Transportation Agency (CTA), including the engagement of a third-party dispute resolution body to accelerate case processing. The government also signaled its intention to strengthen enforcement under the Air Passenger Protection Regulations by empowering the CTA to impose fines of up to CAD 1 million for systemic violations. TC will introduce new legislation and launch a public consultation process to refine these measures. The initiative reflects increasing regulatory focus on consumer protection and enforcement effectiveness in the sector. IATA will closely monitor developments and actively participate in the consultation process to ensure that outcomes support balanced, transparent, and globally aligned frameworks. For more details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).



CHILE: WORKSHOP ADVANCES MIXED-TERMINAL PASSENGER INTEGRATION AT SANTIAGO INTERNATIONAL AIRPORT (SCL)

IATA convened a stakeholder workshop at SCL to present its [Domestic and International Passenger Integration in Airports \(DIP\) framework](#), drawing participation from airlines, government agencies and the airport operator. Discussions were constructive, with broad alignment on both the concept and its feasibility. Participants agreed on an initial, practical scope for implementation at Terminal 2 (piers C–D), while identifying a larger opportunity linked to the future Terminal 3 development. Airlines expressed full support for a Level 2 integrated model, alongside backing from border control authorities and the airport operator. A joint work plan will now be developed to sustain momentum, including targeted sessions on biometric data regulation, passenger flows, infrastructure needs, duty-free operations in mixed environments, IT considerations, and the rollout of new border control kiosks expected this summer. For more details, please contact IATA's Assistant Director, Airport Development, [Sandra Gonzalez](#).



COLOMBIA: IATA URGES MINISTRY OF FINANCE TO REDUCE VAT ON AIRLINE TICKETS AND AVIATION FUEL

IATA has urged Colombia's Ministry of Finance to reduce VAT on aviation fuel and airline tickets, noting that the current 19% VAT on jet fuel places the industry at a competitive disadvantage, particularly compared with other transport modes that benefit from lower tax rates. The association reiterated that reducing VAT to 5% would provide immediate relief, stimulate demand, and strengthen connectivity. This proposal forms part of IATA's ongoing advocacy since 2024 to lower the tax burden and ensure the sustainability of Colombia's aviation sector, supporting tourism, trade, and economic growth. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).



DOMINICAN REPUBLIC: IATA PROVIDES INDUSTRY INPUT ON SECURITY PROTOCOL UPDATES

Following proposed amendments to security protocols by airport defense agency CESAC, IATA submitted comments on behalf of member airlines, highlighting key alignment issues with international standards. Specifically, IATA raised concerns over references to "additional screening" of unaccompanied baggage, noting that this approach is outdated and not consistent with ICAO Annex 17, which promotes "appropriate screening" based on risk assessment. IATA also emphasized that any national requirements exceeding Annex 17 standards should be managed through Supplementary Station Procedures to ensure clarity and consistency for operators. Engagement with the authorities remains ongoing as IATA continues to advocate for harmonized, risk-based security measures that support both compliance and operational efficiency. For details, contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).



MEXICO: IATA ENGAGES AUTHORITIES ON CURP DATA COLLECTION FRAMEWORK

IATA held a working session with the Ministry of Interior, the Ministry of Infrastructure, Communications and Transportation, and the Federal Civil Aviation Agency to address requirements for the collection of CURP (national ID) data and its integration into the Single Identity Platform under the General Population Law. The objective is to identify a practical solution enabling airlines to collect this data locally while ensuring compliance. Follow-up technical discussions between airlines and authorities reviewed potential implementation options, including differentiated approaches for domestic and international carriers. Several technical and regulatory questions remain outstanding, and a further working session is planned in the coming weeks to continue advancing a coordinated and workable framework. For more details, please contact IATA's Country Manager for Mexico, [Cintya Martinez](#).



PERU: AETAI LEGAL ACTION AND JOINT INDUSTRY RESPONSE CHALLENGE LIMA AIRPORT TRANSFER CHARGES

On May 4, the local airline association AETAI filed a legal challenge against the process and level of passenger transfer charges (TUUA) approved by OSITRAN for both domestic and international passengers at Lima Airport. Building on this action, IATA and AETAI subsequently issued a joint press release raising concerns over irregularities in ongoing negotiations between the airport operator and the Ministry of Transport regarding a proposed concession addendum. The proposal focuses solely on eliminating the domestic TUUA through a state subsidy, while leaving international transfer charges unchanged. IATA and AETAI argue that the approach lacks a sound economic basis and appropriate process, and are advocating for deferring any decision until the incoming administration can undertake a comprehensive review. For more details, please contact IATA's Area Manager for Peru and Bolivia, [Martin La Rosa](#).



VENEZUELA: OFAC LICENSE ENABLES IATA SAFETY ACTIVITIES AND ON-THE-GROUND ENGAGEMENT

IATA has secured an OFAC license authorizing aviation safety-related activities in Venezuela, including technical assistance, safety audits, advisory services, industry engagement, and membership support. This development is particularly timely as U.S.–Venezuela air services resume, enabling Miami-based IATA experts to travel to Venezuela and support operations on the ground. The authorization strengthens IATA's ability to advance safety, compliance, and industry coordination in the market. For more details, please contact IATA's Area Manager for Central America and Venezuela, [David Hernandez](#).

