IATA | Americas Focus

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6
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Dear Colleagues,

As we are approaching the end of the Western summer season, I am pleased to share that Saadia Zahidi has been appointed by the IATA Board of Directors as Director General, effective 1 November 2026. Joining IATA from the World Economic Forum, where Saadia served as Managing Director and Member of the Managing Board, she brings extensive experience in global policy, economic development, and stakeholder engagement. We look forward to welcoming Saadia to the industry and introducing her to many of our members across the region in the months ahead.

Safety remains our highest priority, and I am pleased to highlight the launch of a new Joint Runway Safety Initiative by IATA, the Civil Air Navigation Services Organization (CANSO), and Airports Council International (ACI). The initiative aims to reduce the risk of runway incursions through enhanced safety reporting and data collection, stronger local runway safety teams, and the sharing of best practices across the aviation ecosystem. By strengthening collaboration among airlines, airports, air navigation service providers, and regulators, the initiative will help further improve safety outcomes.

Closer to home, the safe restoration of operations at Caracas Simón Bolívar International Airport (CCS) following the devastating earthquakes remains a key industry priority. With Valencia Airport (VLN) currently serving as a temporary gateway and already experiencing capacity constraints, the reopening of CCS is increasingly important for maintaining connectivity to Venezuela. Authorities have indicated that operations may resume by 24 August at approximately 30% of pre-earthquake capacity, following a full operational test. IATA has been invited to participate in this exercise and stands ready to provide technical support to ensure a safe and efficient reopening.

Turning to the latest market performance, global passenger demand measured in revenue passenger kilometers (RPK) declined by 1.7% year-on-year in June. North American carriers recorded a 1.0% decline in demand, while capacity was down 0.7%, resulting in a load factor of 86.9%. In contrast, Latin American airlines continued to demonstrate resilience, posting a 3.5% increase in passenger demand, although capacity growth of 6.3% led to a lower load factor of 81.6%.

Cargo markets continued to provide encouraging signals as global air cargo demand grew by 8.5% year-on-year in June, with all regions recording positive growth. North American carriers led performance with a 13.1% increase in demand, while Latin American and Caribbean airlines recorded a 3.5% increase, supported by continued growth in regional trade flows and international commerce.

As always, please find below the latest IATA activities and developments across the Americas. Should you have any questions or require further information, please do not hesitate to reach out.

PETER CERDÁ
REGIONAL VICE PRESIDENT
THE AMERICAS
IATA

AIR PASSENGER MARKET IN DETAIL

JUNE 2026. DETAILS HERE.

JUNE 2026 (% YEAR-ON-YEAR)	WORLD SHARE[1]	RPK	ASK	PLF(%-PT)[2]	PLF(LEVEL)[3]
Total Market	**100%**	**-1.7%**	**-1.3%**	**-0.4**	**84.2%**
Africa	2.2%	3.8%	4.7%	-0.6	73.9%
Asia-Pacific	34.4%	-2.0%	-2.1%	0.1	83.1%
Europe	26.7%	0.8%	1.4%	-0.5	87.5%
Latin America and the Caribbean	5.4%	1.5%	3.9%	-2.0	81.2%
Middle East	9.5%	-13.9%	-11.3%	-2.3	76.1%
North America	21.8%	-1.1%	-1.1%	0.0	86.1%

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

AIR CARGO MARKET IN DETAIL

JUNE 2026. DETAILS HERE.

JUNE 2026 (%YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	**100%**	**8.5%**	**4.4%**	**1.7**	**46.9%**
Africa	2.1%	4.7%	-7.1%	5.4	48.1%
Asia-Pacific	35.8%	7.9%	4.3%	1.8	51.8%
Europe	21.4%	6.9%	3.7%	1.5	50.5%
Latin America and Caribbean	2.9%	3.5%	9.8%	-2.1	33.9%
Middle East	13.2%	5.6%	2.5%	1.4	46.5%
North America	24.6%	13.1%	6.2%	2.5	40.7%

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

ANTIGUA & BARBUDA: $10 INCREASE IN PASSENGER HEAD TAX

Antigua and Barbuda's Cabinet has approved a US$10 increase in the Passenger Head Tax, reflected in airline ticketing systems as the Airport Administrative Charge (AAC). The increase raises the fee to US$50 each way for international travelers and is intended to support the country's financial commitments to the Eastern Caribbean Civil Aviation Authority (ECCAA) and the Eastern Caribbean Supreme Court. IATA has engaged Minister of Tourism Hon. Charles Fernandez, calling for industry consultation and greater transparency on the use of AAC revenues, seeking a clearer understanding of funding requirements and advocating for charges that are cost-based, transparent, and aligned with ICAO principles. For more details, please contact IATA's Area Manager for the Caribbean, Annaleen Lord.

ARGENTINA: AEROPARQUE DESIGNATED AS LEVEL 2 AIRPORT ALIGNED WITH WASG

Argentina has published a new regulation declaring Buenos Aires Aeroparque Jorge Newbery (AEP) a Level 2 airport and establishing a permanent schedule facilitation framework aligned with the Worldwide Airport Slot Guidelines (WASG). The regulation incorporates key WASG principles, including capacity declarations, facilitator roles, priority criteria, transparency measures, and provisions for transitioning to Level 3 coordination if congestion warrants. This is a significant positive development, creating a WASG-aligned model for future Level 2 airports in Argentina, such as Ezeiza and Bariloche, and serving as a best-practice template for schedule facilitation regionally and globally. For details, contact IATA's Assistant Director, External Affairs, Alejandro Munoz.

BRAZIL: TAX REFORM ENGAGEMENT MISSION SET FOR AUGUST

IATA is coordinating an institutional mission to Brasília on 19-20 August to discuss the implications of Brazil's tax reform for the aviation sector. The initiative comes as airlines continue to navigate uncertainty surrounding the reform process, alongside the implementation of electronic invoicing (BPe-TA) requirements. The engagement reflects ongoing industry efforts to seek greater clarity on implementation details and compliance timelines, which remain key concerns for airline planning. While Brazilian authorities remain committed to advancing the reform, several operational and regulatory aspects continue to be assessed as the sector prepares for the next phase of implementation. To join the mission and get more details, please contact IATA's Assistant Director, External Relations for Brazil, Marcelo Pedroso.

CANADA: TRANSPORT CANADA UNVEILS SUSTAINABLE AVIATION FUELS BLUEPRINT

On 21 July, Transport Canada released its Sustainable Aviation Fuels (SAF) Blueprint, outlining a strategy to develop a domestic SAF industry, reduce aviation emissions, strengthen economic growth, and position Canada as a leader in low-carbon aviation. The blueprint sets out a framework for scaling SAF production and supporting the aviation sector's long-term decarbonization goals. IATA contributed to the development of the blueprint through stakeholder consultations and review processes, providing industry perspectives on the policies and measures needed to accelerate SAF adoption. The publication represents an important step toward creating the conditions required to expand SAF supply, attract investment, and enhance Canada's competitiveness in sustainable aviation. For more details, please contact IATA's Vice President, Member & External Relations, North America, Doug Lavin.

CHILE: NIGHT NOISE RESTRICTIONS REMAIN IN FOCUS AT SANTIAGO AIRPORT

Chile's Directorate General of Civil Aviation (DGAC) has issued an Aeronautical Information Circular (AIC) formalizing nighttime operational restrictions at Santiago International Airport (SCL). The measures, which apply between 00:00 and 06:00, affect Chapter 3 aircraft on both runways and Chapter 4 aircraft on one runway. While the restrictions have been in place since December 2024 through a series of NOTAMs, the AIC provides a more permanent regulatory framework. IATA has engaged extensively with DGAC to express industry concerns regarding both the restrictions and the need to adhere to ICAO's Balanced Approach to aircraft noise management before introducing additional operational measures. DGAC maintains that the restrictions are necessary to comply with environmental obligations and address ongoing community noise-related complaints. IATA submitted a formal response to the DGAC, outlining the industry's position and concerns regarding the long-term impact of the measures. For more details, please contact IATA's Country Manager for Chile, Helen Kouyoumdjian.

COLOMBIA: TAX REFORM PROPOSAL RAISES CONCERNS FOR AVIATION

On 20 July, the Colombian government introduced a tax reform proposal aimed at strengthening fiscal sustainability through higher taxes on fossil fuels, carbon emissions, tourism services, digital imports, and selected consumer goods, while reducing tax exemptions and broadening the tax base. The measures could have significant implications for the aviation sector. Proposed fuel-related taxes may increase airline operating costs, while the elimination of VAT exemptions for services provided to non-resident tourists could affect inbound travel demand. More broadly, the reform may increase costs across the travel and tourism value chain, with potential impacts on passenger demand and Colombia's competitiveness as a destination. IATA is closely monitoring the proposal as it moves through Congress and will continue engaging with policymakers to ensure the aviation sector's interests are considered during the legislative process. For details, contact IATA's Country Manager for Colombia, Paula Bernal.

DOMINICAN REPUBLIC: GUIDANCE ON DEPARTURE TAX INCREASE

Following engagement between ALA, IATA, and the Dominican Republic's General Directorate of Internal Taxes (DGII), authorities have issued guidance on the increase in the country's Departure Tax from US$20 to US$30. A transitional period through 30 September allows airlines to report collections at both rates, facilitating implementation of the revised charge. Airlines are encouraged to independently assess any potential impacts related to tickets issued between 19 and 24 June, as well as remittance obligations beginning 1 October 2026. The guidance provides greater clarity for carriers as they adapt their systems and reporting processes to the new requirements. IATA continues to monitor implementation and has encouraged airlines to share any operational or financial concerns to support an assessment of industry impacts and determine whether further engagement with authorities may be necessary. For more details, please contact IATA's Area Manager for the Caribbean, Annaleen Lord.

MEXICO: TAX WITHHOLDING EXEMPTION FOR AIRLINE SALES THROUGH DIGITAL PLATFORMS

Mexico's 2026 Miscellaneous Tax Rules introduced an exemption from income tax (ISR) and value-added tax (VAT) withholding requirements for airlines selling domestic and international air transport services through digital intermediary platforms. The measure follows sustained industry advocacy and represents a positive development for the aviation sector. The exemption applies to both Mexican carriers and qualifying foreign airlines, helping reduce administrative complexity and providing greater certainty for airline sales conducted through digital channels. The change is expected to support a more efficient regulatory framework while facilitating compliance for airlines operating in the Mexican market. For details, contact IATA's Country Manager for Mexico, Cintya Martinez.

PERU: CONGRESS ARCHIVES AVIATION-RELATED CONSUMER BILLS

With the inauguration of Peru's new bicameral Congress, 17 legislative proposals opposed by the aviation industry were archived on 14 July. Among the measures set aside were bills that would have required airlines to provide free seat selection and a complimentary carry-on bag across all fare categories, regardless of ticket type. The development is viewed as a positive outcome for the sector, reducing the immediate risk of regulations that could have increased costs and limited airlines' ability to offer differentiated fare products. While industry stakeholders remain vigilant, the new bicameral structure introduces additional legislative review stages that may make similar proposals more difficult to advance. Separately, legislation concerning ticket endorsement remains under regulatory review. Notably, progress has been made with the recognition that international air travel will be excluded from the measure's scope. For more details, please contact IATA's Area Manager for Peru and Bolivia, Martin La Rosa.

UNITED STATES: DOT ROLLS BACK ANCILLARY FEE RULE, EXTENDS REFUND ENFORCEMENT RELIEF

The U.S. Department of Transportation (DOT) has restored its previous regulations on airline ancillary fee disclosures, reversing changes introduced under the 2024 Enhancing Transparency of Airline Ancillary Service Fees rule. The move follows a decision by the U.S. Court of Appeals for the Fifth Circuit, which vacated the rule after a successful legal challenge by Airlines for America, IATA, and other industry stakeholders. In a separate action, the DOT extended through 1 July 2027 its enforcement discretion regarding certain airline refund requirements. Under existing regulations, a flight assigned a new flight number may be considered canceled, potentially triggering refund eligibility. The extension allows airlines to rebook passengers on renumbered flights without triggering enforcement action, provided the flight operates as scheduled without significant changes or delays. The measures provide greater regulatory certainty for carriers while broader consumer protection rules remain in place. For more details, please contact IATA's Vice President, Member & External Relations, North America, Doug Lavin.