Americas Focus

YOUR SOURCE FOR IATA'S LATEST REGIONAL ACTIVITIES

7
2026

Dear Colleagues,

The power of collaboration was on full display in Santiago, Chile, where government authorities, IATA, airlines, airport operators, and industry stakeholders came together through the *Vuelo Limpio* initiative over a two-year project to deliver measurable environmental and operational benefits.

A recent study confirmed that new simultaneous approach procedures at Santiago Airport are reducing flight times by an average of 2.5 minutes and saving 37 kilograms of fuel per operation. Collectively, this translates into annual fuel savings of nearly 570,000 kilograms and the avoidance of approximately 1,800 tonnes of CO_2 emissions, while also improving air traffic flow, airport efficiency, and workload management for pilots and controllers.

The success of *Vuelo Limpio* demonstrates what is possible when regulators and industry work together toward a shared vision. Through the collaborative framework of Chile's Mesa Vuelo Verde, public and private sector partners were able to identify, implement, and validate operational improvements that benefit airlines, passengers, the environment, and the country as a whole.

As our region continues to pursue growth, efficiency, and sustainability, Santiago provides a compelling example of how government-industry collaboration can turn innovative ideas into tangible results. Airports across Latin America, including key hubs such as Bogotá, Mexico City and Lima, have an opportunity to replicate this model and unlock similar benefits for their aviation ecosystems, economies, and communities.

Shifting to IATA's latest economic analysis, jet fuel prices rose by 12.2% month-on-month in July and were 56.9% higher than a year earlier. However, global air passenger demand increased 0.2% year-on-year in July 2026 (1.2% excluding the Middle East), with capacity up 0.3% and a strong global load factor of 85.2%. North American carriers saw demand decline 2.3%, with transatlantic traffic down 2.2%, but a robust load factor of 88.2% was maintained. Latin American airlines continued to outperform with demand growth of 7.1% and an 85.7% load factor.

Global air cargo demand increased 3.9% year-on-year in July 2026 (4.7% for international operations), reflecting continued resilience in freight markets. North American carriers led all regions with 4.8% demand growth despite a 1.5% reduction in capacity, while Latin American and Caribbean carriers recorded a solid 4.1% increase in demand, supported by a 7.0% expansion in capacity.

Last but not least, I would like to highlight three upcoming events: We will hold an Aviation Day for Canada in Ottawa jointly with NACC on October 8, followed by an Air Cargo Day for Colombia in Bogotá, and conclude with the Aviation Day Honduras in San Pedro Sula on December 8. If you would like to learn more, please feel free to reach out to my team.

As always, please find the latest IATA activities and developments across the Americas below. Should you have any questions, please do not hesitate to contact me.

PETER CERDÁ
REGIONAL VICE PRESIDENT
THE AMERICAS

AIR PASSENGER MARKET IN DETAIL

JULY 2026. DETAILS HERE.

JULY 2026 (% YEAR-ON-YEAR)	WORLD SHARE[1]	RPK	ASK	PLF(%-PT)[2]	PLF(LEVEL)[3]
Total Market	**100%**	**0.2%**	**0.3%**	**-0.1**	**85.2%**
Africa	2.2%	5.2%	7.3%	-1.5	75.1%
Asia-Pacific	34.4%	1.0%	0.3%	0.6	83.7%
Europe	26.7%	2.1%	2.3%	-0.1	87.7%
Latin America and the Caribbean	5.4%	6.1%	6.6%	-0.4	85.3%
Middle East	9.5%	-10.0%	-6.2%	-3.4	80.7%
North America	21.8%	-1.2%	-1.8%	0.6	87.3%

AIR CARGO MARKET IN DETAIL

JULY 2026. DETAILS HERE.

	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	**100%**	**3.9%**	**1.7%**	**1.0**	**46.0%**
Africa	2.1%	1.1%	4.1%	-1.4	45.8%
Asia-Pacific	35.8%	4.1%	3.0%	0.5	49.5%
Europe	21.4%	4.4%	1.3%	1.5	51.1%
Latin America and Caribbean	2.9%	4.1%	7.0%	-0.9	32.3%
Middle East	13.2%	1.7%	4.0%	-1.0	44.1%
North America	24.6%	4.8%	-1.5%	2.5	41.2%

ARGENTINA: GOVERNMENT LAUNCHES AIRSPACE MODERNIZATION WORKING GROUP

Argentina's Secretariat of Transportation has issued Resolution IF-2026-85605290-APN-SSTA, formally establishing a Technical Working Group to advance airspace modernization and improve operational efficiency across the country. The initiative follows discussions held in July between IATA, the Secretary of Transportation, and the Secretary of Infrastructure, and it will bring together key aviation stakeholders, including ANAC, EANA, airlines, IATA, JURCA, and ACI. Its mandate is to evaluate the organization and management of Argentina's airspace and develop a set of recommendations aimed at enhancing efficiency, capacity, and operational performance. The resolution sets a deadline of December 1, 2027, for the Working Group to submit its recommendations to the Secretary of Transportation, marking an important step toward a more modern and collaborative approach to airspace management in Argentina. For more details, please contact IATA's Head of ATM, Latin America & Caribbean, Julio Perreira.

BRAZIL: AVIATION SECTOR PRESSES CASE AS TAX REFORM MOVES FORWARD

IATA and airlines continued engaging policymakers as implementation of Brazil's tax reform advances. In August, IATA led a high-level mission to Brasília, bringing together 13 airlines for meetings with Vice President Geraldo Alckmin and senior government officials to underscore aviation's contribution to connectivity, tourism and economic development. The discussions generated support for IATA's proposal to zero-rate aviation under the new tax framework, although the Ministry of Finance remains opposed. Authorities also published the implementation schedule for the new IBS/CBS tax regime, including a 1 December 2026 deadline for mandatory electronic tax documentation in aviation. While no major decisions are expected before October's elections, zero-rating remains under consideration and the election outcome could influence the reform's final direction. For more details, please contact IATA's Country Manager for Brazil, Simone Tcherniakovsky.

BRAZIL: SAF FRAMEWORK SETS COURSE FOR AVIATION EMISSIONS CUTS

Brazil has enacted a decree regulating its National Sustainable Aviation Fuel Program (ProBioQAV), establishing the framework for the production, certification, commercialization and use of sustainable aviation fuel (SAF). The measure supports emissions reduction requirements under Law No. 14,993/2024, which call for airlines to reduce greenhouse gas emissions by 1% beginning in 2027, with targets rising gradually to 10% by 2037 through SAF use. The decree also creates a Sustainable Aviation Fuel Sustainability Certificate, enabling the environmental attributes of SAF to be traded separately from the physical fuel through a "Book & Claim" system. IATA actively contributed to the public consultation and stakeholder engagement process that informed the decree and its implementation framework. The measure is expected to stimulate investment in Brazil's emerging SAF market and strengthen the country's position as a potential global supplier of sustainable aviation fuel. For more details, please contact IATA's Manager, Sustainability, The Americas, Fiona Lopez.

CANADA: AIRPORT PRIVATIZATION DISCUSSION HIGHLIGHTS NEED FOR ECONOMIC OVERSIGHT

IATA met with Transport Canada on 17 August to discuss international airport ownership, privatization and economic regulation models, examining how different ownership structures interact with regulatory frameworks and highlighting the role of independent economic oversight in supporting affordability, service quality, investment discipline and long-term sector sustainability. Drawing on global best practices, ICAO policy principles and experiences from Europe and other markets, IATA outlined lessons from airport concession and privatization models, including approaches to balancing government policy objectives, attracting private investment, protecting consumers and ensuring efficient infrastructure development. IATA emphasized that robust, independent economic regulation should be established before any changes to airport ownership or governance are considered. Reflecting Transport Canada's interest in the topic, officials requested that IATA conduct a follow-up workshop to further explore international best practices and policy options. For details, contact IATA's Vice President, Member & External Relations, North America, Doug Lavin.

CAYMAN ISLANDS: ANS MODERNIZATION PROGRAM ADVANCES FOLLOWING INDUSTRY CONSULTATION

The Cayman Islands Airports Authority (CIAA) has confirmed that revised Air Navigation Services (ANS) charges will take effect on 1 December 2026 to support its air traffic management modernization program, including the introduction of radar-based surveillance, upgraded systems, additional staffing and enhanced training. The charging framework was finalized following consultations with airlines and IATA throughout 2024 and 2025.The final structure incorporates several changes sought by industry, including the retention of an 80-tonne cap on weight-based charges and the removal of a proposed flat-rate charge for domestic flights. CIAA has also provided approximately four months' advance notice of implementation, responding to requests raised during the consultation process. For more details, please contact IATA's Area Manager for the Caribbean, Annaleen Lord.

COLOMBIA: EXTENSION OF SARLAFT COMPLIANCE REPORTING DEADLINE

Colombia's Superintendency of Transportation has extended the deadline for the first compliance report under the System for Money Laundering, Terrorism Financing, and Financing of the Proliferation of Weapons of Mass Destruction (SARLAFT) and Risk Management System (RMS) framework. Under Circular Externa No. 20265330000134, regulated entities now have until 10 October 2026 to submit their reports, following implementation and data-upload challenges associated with the new SINST-VIGIA 2 reporting platform. The October filing will consolidate reporting requirements for both the May-June 2026 period and the July-September 2026 period. The regulator indicated that the regular reporting schedule will resume thereafter, with reports covering October-December 2026 due within the first 10 days of January 2027. The extension provides affected entities additional time to adapt to the new reporting system and complete required submissions. For details, contact IATA's Country Manager for Colombia, Paula Bernal.

MEXICO: AVIATION REFORM PACKAGE ADVANCES TOWARD CONGRESSIONAL REVIEW

IATA participated alongside airlines, airports and pilot representatives in a briefing hosted by Mexico's Ministry of Infrastructure, Communications and Transport (SICT) and aviation regulator AFAC on proposed amendments to the Civil Aviation and Airports Laws. The ICAO-aligned reform package addresses issues including unruly passengers, airport slots, facilitation, accident investigation and institutional governance. Following industry requests, authorities shared the draft legislation for stakeholder review. IATA coordinated an assessment with its technical experts and member airlines before submitting a consolidated industry position. Overall, the proposed amendments have been viewed positively, reflecting efforts to strengthen alignment with international standards and recommended practices. As the proposals move into the legislative process, with Congress having begun its new session on September 1, IATA will continue engaging with authorities to ensure industry feedback is reflected in the final legislation. For more details, contact IATA's Country Manager for Mexico, Cintya Martinez.

PERU: NEW GOVERNMENT SIGNALS SUPPORT FOR AVIATION COMPETITIVENESS AGENDA

IATA and airlines met with senior officials in Peru's new administration to advance key industry priorities, with a particular focus on eliminating the airport transfer charge (TUUA), which is undermining LIM's competitiveness as a regional hub. Discussions with the Prime Minister, Transport Minister, and Foreign Trade and Tourism Minister produced commitments to further engage with industry and explore potential solutions. Officials agreed on the importance of strengthening Peru's connectivity and competitive position, including through improved coordination between government and industry stakeholders, and expressed interest in broader issues including aviation infrastructure, regulatory modernization, and connectivity development. IATA additionally proposed hosting an Aviation Day Peru in 2027 to support strategic dialogue between policymakers and industry leaders, an initiative that was positively received across the administration. For more details, please contact IATA's Area Manager for Peru and Bolivia, Martin La Rosa.

UNITED STATES: IATA CHALLENGES FCC DECISION ON 5G RETROFIT REIMBURSEMENT

IATA has filed a petition with the U.S. Court of Appeals for the District of Columbia challenging an FCC decision that excludes foreign airlines from reimbursement for radio altimeter retrofits required to address potential interference from Upper C-Band 5G services. While the FCC's July 2026 order provides reimbursement for U.S. carriers, it determined that extending the program to foreign operators would not be in the public interest. The challenge follows an FAA rule requiring both U.S. and foreign carriers to equip aircraft with interference-tolerant radio altimeters by December 2030. The FAA estimates compliance costs at USD 2.21 billion for U.S. carriers and USD 1.44 billion for foreign carriers. IATA argues that excluding foreign airlines creates unjustified differential treatment for more than 100 airlines serving the U.S. market and is seeking judicial review while continuing to support reimbursement for all affected operators. For more details, contact IATA's Vice President, Member & External Relations, North America, Doug Lavin.

IATA: INDUSTRY RAISES CONCERNS OVER THE OPERATIONAL IMPACT OF GROWING SPACE LAUNCH ACTIVITY

IATA continues to raise industry awareness of the growing operational impact of commercial space launches, presenting data to ICAO's ATPOPS Panel Working Group showing how launch and re-entry activities create airspace restrictions, rerouting, delays, additional fuel burn, and broader network inefficiencies for airlines. As a result of the increased focus on this issue, ICAO will host the *Space Operations 101: Operational Impact on Air Traffic Management (ATM) in the NAM/CAR/SAM Regions Workshop* on 2-4 November 2026 in Orlando. Developed jointly by ICAO, CANSO, IATA, and the FAA, the in-person workshop will examine the impact of growing commercial space activity on airspace capacity, cross-border coordination, traffic flow management, contingency planning, and collaboration between aviation and space stakeholders. The event represents a unique opportunity for regulators, ANSPs, and industry experts to address a rapidly emerging challenge affecting the efficiency of the regional and global air transport network. For more details, please contact IATA's Head of ATM-CNS for the Americas, Jaime Abigantus.