



Dear Colleagues,

Last week, more than 300 leaders from airlines, airports, government, regulators and industry partners gathered in Ottawa for IATA's Aviation Day Canada, co-hosted with the National Airlines Council of Canada (NACC). Discussions focused on the policies and investments needed to keep Canada's aviation sector affordable, efficient, sustainable and globally competitive, while reinforcing aviation's vital role in supporting trade, tourism and connectivity across the country. A key topic was the future of Canada's airport model, with Transport Minister Steven MacKinnon reaffirming the government's commitment to engage closely with industry as it explores long-term concession opportunities for the country's four largest airports. IATA emphasized the importance of ensuring that any future model is built on global best practices and promotes transparency, accountability, regional connectivity, affordability, modern infrastructure, and an improved passenger experience. Please find more details on IATA's engagement with the Canadian government below.

The event also covered aviation supply chain challenges, accessibility, passenger rights, and regulatory developments, drawing strong engagement from government and industry leaders. You can access the presentations, materials, and photos from Aviation Day Canada [here](#).

Looking ahead, IATA will host a dedicated [Cargo Day for Colombia](#) in Bogotá on 11 November and an [Aviation Day for Honduras](#) in San Pedro Sula on 8 December.

Shifting to IATA's latest economic analysis, [global air passenger demand](#) declined 0.8% year-on-year in August 2026, reflecting continued weakness in the Middle East. Excluding the region, however, demand grew 0.6%, while industry capacity increased 0.3% and the global load factor remained strong at 85.1%. North American carriers saw a decrease in demand of 1.7% while capacity decreased 1.1% year-on-year, and the load factor was 86.8%. Latin American airlines achieved a 6.7% increase in demand and capacity climbed 6.4% year-on-year with a load factor of 84.8%.

[Global air cargo demand](#) remained resilient, increasing 4.4% year-on-year in August 2026 (5.3% for international operations), while capacity declined 0.1%, supporting higher load factors despite continued fuel cost pressures. North American carriers led all regions with a 6.6% increase in cargo demand, even as capacity fell 2.5%. Latin American and Caribbean airlines also delivered a strong performance, posting 5.1% demand growth supported by a 3.3% increase in capacity. The results underscore the strength of cargo markets heading into the year-end peak season, supported by expanding global trade and manufacturing activity.

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

AUGUST 2026. DETAILS [HERE](#).

AUGUST 2026 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	-0.8%	0.3%	-0.9	85.1%
Africa	2.2%	4.4%	7.2%	-2.1	77.5%
Asia-Pacific	34.4%	1.4%	1.3%	0.1	85.9%
Europe	26.7%	0.7%	1.4%	-0.6	87.5%
Latin America and the Caribbean	5.4%	5.3%	6.3%	-0.8	84.0%
Middle East	9.5%	-14.6%	-9.3%	-4.9	78.9%
North America	21.8%	-2.2%	-1.0%	-1.0	84.6%

AIR CARGO MARKET IN DETAIL

AUGUST 2026. DETAILS [HERE](#).

AUGUST 2026 (% YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	100%	4.4%	-0.1%	2.0	46.0%
Africa	2.1%	3.0%	14.0%	-3.9	36.5%
Asia-Pacific	35.8%	4.3%	1.2%	1.5	48.6%
Europe	21.4%	4.1%	-3.5%	3.9	53.0%
Latin America and Caribbean	2.9%	5.1%	3.3%	0.6	34.9%
Middle East	13.2%	1.0%	3.3%	-1.0	43.1%
North America	24.6%	6.6%	-2.5%	3.6	42.0%

ARGENTINA: AIRPORT TARIFF OVERHAUL FOLLOWING CONCESSION EXTENSION

Argentina's airport regulator, ORSNA, has approved a broad revision of fees and charges across Group A airports of the national airport system, following the government's decision to extend Aeropuertos Argentina's concession from 2038 to 2049. The extension is tied to an additional US\$600 million investment program, with a potential further extension to 2056 subject to financing and project-delivery milestones. The tariff changes expand eligibility for reduced regional passenger charges by increasing the distance threshold from 300 km to 1,000 km, lowering fees to USD25 per pax on a limited number of existing cross-border routes. All routes beyond 1,000 km, including long-haul international operations, remain at USD 57 per pax. Domestic charges rise from USD3.67 to USD 9 per pax, and, for the first time, be denominated in U.S. dollars, helping preserve their value against inflation and currency depreciation. ORSNA also formalized a 30% reduction in published landing and parking charges, effectively incorporating a discount airlines have long received for timely payment. IATA is engaging the authorities to better understand the methodology behind the changes and provide industry feedback. For more details, contact IATA's Area Manager for Argentina, [Maria Jose Taveira](#).

BRAZIL: LATEST TAX REFORM DEVELOPMENTS

Recent engagements with the Secretary of Civil Aviation (SAC) and the Brazilian Federal Revenue Service (RFB) have generated encouraging signals regarding aviation tax reform. Authorities are assessing whether an administrative solution for international aviation could be legally viable, although resistance from other government stakeholders means that legislative clarification remains a potential robust long-term approach. Discussions on BP-e also pointed to a willingness to simplify compliance requirements and reduce implementation burdens. While government counterparts remain engaged and receptive to industry concerns, significant legal, political, and institutional hurdles persist. IATA continues to monitor developments closely, particularly as the new measures could take effect in less than two months, increasing the urgency for regulatory clarity and practical implementation solutions. For more details, please contact IATA's Country Manager for Brazil, [Simone Tcherniakovsky](#).



BRAZIL: TIGHTENING OF CONSUMER PROTECTION RULES WITH IMPACT TO AIRLINES



Brazil has issued a new decree updating Consumer Service Center (SAC) regulations under the Consumer Protection Code, introducing stricter customer-service requirements that will affect airlines and other service providers. Key provisions include 24/7 availability of at least one electronic service channel, real-time human assistance from 8 a.m. to 8 p.m. daily, enhanced telephone-service standards, immediate cancellation options across all service channels, limits on advertising during customer interactions, and new recordkeeping and reporting obligations. The decree was adopted without a formal public consultation process, preventing industry stakeholders from providing input before publication. With the rules set to take effect on November 2, 2026, affected companies face a compressed implementation timeline. IATA is reviewing the new requirements and engaging with relevant authorities to assess their operational impact on member airlines. For more details, please contact IATA's Assistant Director, External Affairs, Brazil, [Marcelo Pedroso](#).

CANADA: AIRPORT PRIVATIZATION DISCUSSION HIGHLIGHTS NEED FOR ECONOMIC OVERSIGHT



The Canadian government has confirmed plans to place Toronto (YYZ), Montreal (YUL), Vancouver (YVR) and Calgary (YYC) airports under long-term concession agreements, reportedly under a dual-till framework, with the objective of generating significant value for the federal government. Against this backdrop, IATA met on 24-25 September in Ottawa with representatives from the Privy Council Office, Finance Canada, the Canada Development Investment Corporation (CDEV), Transport Canada, the Tourism Industry Association of Canada (TIAC), the Canadian Airports Council (CAC) and the Air Transport Association of Canada (ATAC). Discussions focused on the government's consideration of alternative ownership and concession models for major airports, as well as the safeguards needed to protect connectivity, affordability, service quality and long-term infrastructure investment. IATA continues to engage with policymakers to ensure that any future airport governance model delivers benefits for passengers, airlines and the broader Canadian economy. For details, contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

CHILE: INDUSTRY PUSH FOR STRONGER MEASURES AGAINST UNRULY PASSENGERS



Efforts to curb unruly passenger incidents in Chile are advancing as IATA, ACHILA, and the country's airlines jointly advocate for a strengthened regulatory framework. The proposal seeks to improve the prevention, management, and enforcement of measures addressing disruptive behavior both onboard aircraft and across airport facilities, while aligning Chile's approach with international standards and industry best practices. The initiative has received a positive response from policymakers and industry stakeholders. It is currently under review by relevant government authorities and members of Congress, marking an important step toward enhancing aviation safety, protecting frontline personnel, and ensuring a more secure and efficient travel environment for passengers throughout Chile. For more details, please contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).

COLOMBIA: BOGOTÁ (BOG) TAXIWAY WORKS DEFERRED TO PROTECT PEAK-SEASON CAPACITY



Colombia's Civil Aviation Authority has postponed the start of construction works on Taxiway Kilo at Bogotá El Dorado Airport (BOG) from December 2026 to February 2027, following concerns raised by the airline industry over the impact on airport capacity during the peak travel season. The project was expected to reduce available capacity at Bogotá, affecting both passenger and cargo operations during the current and upcoming scheduling seasons. In response, IATA submitted a request for reconsideration to the Civil Aviation Authority and the Ministry of Transport, highlighting the operational and commercial implications for flights and services that had already been scheduled and sold. The decision to defer the works preserves capacity during a critical period for airlines and airport users, while allowing the infrastructure project to move forward after the peak season. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).

COSTA RICA: ENGAGEMENT OF NEW GOVERNMENT ON AVIATION PRIORITIES



In the context of Costa Rica's newly elected administration, IATA and the local airline association, ALA, met with Transport Minister Efraín Zeledón to discuss key challenges and opportunities facing the country's aviation sector. Discussions focused on industry governance, airport infrastructure development, particularly at Liberia's Daniel Oduber International Airport (LIR), air traffic control staffing, the findings of the recent ICAO audit, and the current regulatory framework. The meeting provided an opportunity to highlight aviation's contribution to connectivity, tourism and economic development, while identifying areas where policy and operational improvements could support future growth. IATA and ALA look forward to building a constructive relationship with the new administration and supporting efforts to strengthen the competitiveness and sustainability of Costa Rica's aviation industry. For more details, please contact IATA's Area Manager for Central America, Ecuador & Venezuela, [David Hernandez](#).

EASTERN CARIBBEAN: PROPOSED ECCAA PASSENGER FEE UNDER REVIEW



The Eastern Caribbean Civil Aviation Authority (ECCAA) is considering the introduction of a US\$2.50 fee on arriving and departing passengers in Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines to support aviation safety oversight activities. As discussions progress, industry stakeholders have stressed the need for transparent and sustainable funding mechanisms, while seeking greater clarity on the fee methodology, use of proceeds, implementation arrangements and governance framework. Particular attention has been given to avoiding potential duplication of charges, especially in Antigua and Barbuda, where airlines already contribute to ECCAA funding through existing NAV/COMM fees. IATA continues to engage with ECCAA and national authorities to advocate for consultation, transparency and alignment with international principles on cost recovery and user charges. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

MEXICO: IATA INTENSIFIES ADVOCACY ON PASSENGER RIGHTS LEGISLATION



In response to a series of bills under consideration in Mexico's Congress addressing passenger rights, consumer protection, price controls and other measures that could significantly affect the aviation sector, IATA has met with key legislators to outline the potential impact on competition, connectivity and airline operations. The objective is to help ensure that proposed regulations do not create unintended consequences for airlines or passengers. IATA has also engaged with the executive branch, including the Secretariat of Infrastructure, Communications and Transport (SICT) and the Federal Consumer Protection Agency (PROFECO), to provide industry perspectives on the proposals. Through this coordinated outreach, IATA is working to promote a balanced regulatory framework that protects passenger interests while preserving competition, operational flexibility and the long-term sustainability of Mexico's aviation sector. For more details, please contact IATA's Country Manager for Mexico, [Cintya Martinez](#).

PERU: AIR CONNECTIVITY WORKING GROUP RESUMES ACTIVITIES



Peru's Ministry of Foreign Trade and Tourism (MINCETUR) has reinstated its Air Connectivity Working Group, reaffirming the government's focus on strengthening the country's aviation and tourism sectors. The forum is being led by Minister of Foreign Trade and Tourism, serving as the principal platform for coordination among government agencies, airlines, IATA and other industry stakeholders, providing a forum to address shared priorities and policy initiatives. Discussions are focused on strengthening air connectivity, stimulating tourism demand and enhancing Peru's competitiveness as an air transport market. The resumption of the group's activities is expected to facilitate closer public-private collaboration on measures that support sustainable growth and improve the country's connectivity objectives. For details, contact IATA's Country Manager for Peru and Bolivia, [Martin La Rosa](#).