Americas Focus

YOUR SOURCE FOR IATA'S LATEST REGIONAL ACTIVITIES



9

2026

Dear Colleagues,

This week, the 7th ICAO Air Transport Conference (ATConf/7) took place in Montreal, bringing together governments, industry stakeholders, and international organizations to help shape the future direction of global aviation policy for the coming decade. IATA played an active role in the discussions, advocating for policies that support sustainable growth, global connectivity, efficient regulation, modernized passenger processes, and the industry's net-zero transition. To support these discussions, IATA submitted eight papers, covering topics such as sustainable aviation fuel (SAF), CORSIA, digital identity, passenger facilitation, consumer protection, infrastructure financing, taxation, and economic regulation. IATA's papers and recommendations are available here for your reference.

I am also pleased to share that we have updated IATA's Value of Aviation reports, covering more than 90 countries, including 19 in the Americas region. These reports provide a comprehensive assessment of aviation's measurable economic contribution to national economies around the world, analyzing the industry's impact on GDP and employment, while also tracking key aviation indicators such as passenger traffic, air connectivity, air cargo activity, and the affordability of air transport.

We are now working on translating the reports into Spanish, Portuguese, and French, but the English versions are already available and can be accessed here. I hope these materials are useful in your own advocacy efforts with government authorities and industry stakeholders.

Shifting to IATA's latest economic analysis, global air passenger demand declined 0.5% year-on-year in September 2026, reflecting the continued impact of conflict in the Middle East, while the global load factor remained solid at 83.2%. North American carriers recorded flat demand year-on-year, with capacity down 1.9% and the load factor improving to 84.9%. Latin American airlines continued to outperform global trends, posting an 8.2% increase in demand while capacity grew 7.6%, resulting in a load factor of 83.9%.

Global air cargo markets gained momentum in September, with demand increasing 7.7% year-on-year amid continued strength in international trade, which has now expanded for 42 consecutive months. North American carriers led all regions with an 11.8% increase in cargo demand, supported by a 0.8% rise in capacity. Latin American and Caribbean airlines also delivered strong results, recording 6.7% demand growth alongside a 7.6% increase in capacity. The performance highlights the resilience of air cargo markets and their role in supporting global supply chains and trade growth.

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

SEPTEMBER 2026. DETAILS HERE.

SEPTEMBER 2026 (% YEAR-ON-YEAR)	WORLD SHARE[1]	RPK	ASK	PLF(%-PT)[2]	PLF(LEVEL)[3]
Total Market	**100%**	**-0.5%**	**-0.2%**	**-0.3**	**83.2%**
Africa	2.2%	5.0%	7.7%	-1.9	73.5%
Asia-Pacific	34.4%	0.5%	0.1%	0.3	83.4%
Europe	26.7%	0.3%	-0.1%	0.3	86.6%
Latin America and the Caribbean	5.4%	4.3%	5.1%	-0.6	82.9%
Middle East	9.5%	-8.0%	-3.8%	-3.6	78.2%
North America	21.8%	-1.6%	-1.3%	-0.2	81.8%

AIR CARGO MARKET IN DETAIL

SEPTEMBER 2026. DETAILS HERE.

SEPTEMBER 2026 (%YEAR-ON-YEAR)	WORLD SHARE *1	CTK	ACTK	CLF (%-PT) *2	CLF (LEVEL) *3
Total Market	**100%**	**7.7%**	**2.7%**	**2.2**	**47.9%**
Africa	2.1%	4.7%	-1.2%	2.7	47.0%
Asia-Pacific	35.8%	8.6%	4.9%	1.7	50.7%
Europe	21.4%	4.5%	-1.6%	3.2	54.6%
Latin America and Caribbean	2.9%	6.7%	7.6%	-0.3	34.3%
Middle East	13.2%	3.8%	7.0%	-1.4	44.0%
North America	24.6%	11.8%	0.8%	4.3	43.9%

ARGENTINA: WORKING GROUPS LAUNCH EFFORTS TO MODERNIZE AIRSPACE AND STRENGTHEN GOVERNANCE

The two ad hoc working groups established under the Secretary of Transport's Resolutions 67 and 72, issued in September 2026, have formally commenced their work. The first group, tasked with the redesign and optimization of Argentina's airspace, agreed on the scope of the initiative based on ICAO standards and best practices and approved the IATA work plan to develop recommendations aimed at improving the efficiency and performance of Argentina's air navigation system. The second group, focused on strengthening transparency, predictability, and stakeholder participation in aviation charges, has already met on several occasions and is expected to deliver its recommendations by 1 December 2026. Both groups are jointly facilitated by the Undersecretariat of Air Transportation and IATA, with participation from ANAC, EANA, airlines, JURCA, and other key industry stakeholders. For details, contact IATA's Area Manager for Argentina, Paraguay, and Uruguay, Maria Jose Taveira.

ANTIGUA & BARBUDA: AIRPORT CHARGE INCREASE CONFIRMED DESPITE INDUSTRY CONCERNS

The Government of Antigua and Barbuda has confirmed that the Airport Administrative Charge will increase by USD 10 per arriving and departing international passenger effective 1 December, including USD 5 allocated to the Eastern Caribbean Civil Aviation Authority (ECCAA). Prior to the decision, IATA actively engaged with the government, advocating for meaningful consultation with airlines and other industry stakeholders, greater transparency on the rationale for the increase, and supporting financial justification for the additional charges. As part of these efforts, IATA issued a public statement calling for dialogue with industry and seeking greater clarity regarding the planned use of the additional revenues and the potential impact on air connectivity, affordability, and travelers. Despite these representations, the government proceeded with the increase without undertaking the consultation process requested by the industry. For more details, please contact IATA's Area Manager for the Caribbean, Annaleen Lord.

BRAZIL: AVIATION TAX REFORM DEVELOPMENTS

IATA continued its engagement with the Government of Brazil regarding the implementation of the country's new tax framework and its implications for international aviation. Discussions with authorities confirmed that the inclusion of international air transport within the new tax regime is a deliberate policy decision, making a full exemption unlikely in the near term. However, ongoing dialogue helped advance consideration of potential mitigation measures, including a reciprocity-based approach for international aviation and possible relief on the taxation of fuel, catering, onboard supplies, and other key operational inputs. In a positive development for the industry, the government issued RFB/CGIBS Joint Act No. 7 on 13 November, postponing mandatory BP-e issuance and related reporting obligations for airlines until 1 March 2027. The measure provides additional time for implementation while authorities evaluate simplifications to compliance requirements. IATA will continue engaging the government for additional regulatory guidance and compliance support. For more details, please contact IATA's Assistant Director, External Affairs, Brazil, Marcelo Pedroso.

BRAZIL: CONSUMER SERVICE DECREE TRANSITION PERIOD

Following the entry into force of Decree No. 13.135/2026, Brazilian authorities approved a 90-day transition period effective 11 November 2026 for the implementation of the new consumer service obligations. During this period, consumer protection authorities are expected to focus on monitoring, guidance, and supporting compliance rather than enforcement, providing companies with additional time to adapt to the new requirements. IATA will continue engaging with relevant authorities, including ANAC, to promote implementation approaches that recognize the operational realities of the air transport sector, particularly for international airlines. For more details, please contact IATA's Country Manager for Brazil, Simone Tcherniakovsky.

CHILE: MAJOR MILESTONE IN AIR CARGO DIGITALIZATION

Chile reached a major milestone in air cargo digitalization with the successful integration of the SICEX (Integrated Foreign Trade System) into air cargo operations. Using IATA standards, cargo data can now be exchanged electronically between supply chain stakeholders and Chilean Customs, improving efficiency, transparency, and connectivity across the logistics chain. The solution has already been adopted by two international airlines, with additional carriers expected to join in the coming months. The initiative is expected to streamline export processes, improve traceability, reduce manual interventions, and enhance predictability for all stakeholders. This achievement reflects strong collaboration between industry and government authorities while reinforcing the adoption of globally recognized IATA standards. For more details, contact IATA's Country Manager for Chile, Helen Kouyoumdjian.

COLOMBIA: PASSENGER INFORMATION REQUIREMENTS REVOKED

In a positive development for airlines operating in Colombia, the Superintendence of Transport (ST) issued Resolution 10357 of 2026 on 12 November, revoking the requirements established under Resolution 9788 of 2026 that would have mandated domestic and international airlines to install QR codes on aircraft seatbacks linking passengers to the official complaints and customer feedback platform (PQRSDF). Prior to the decision, IATA engaged with the regulator and highlighted the operational and implementation challenges associated with the measure, including fleet configuration constraints, consistency across aircraft, and alignment with existing airline customer service channels. The revocation removes a potential operational burden and reflects the constructive dialogue between industry and regulators. For more details, please contact IATA's Country Manager for Colombia, Paula Bernal.

CURAÇAO: PROPOSED TOURIST ENTRY TAX OF USD75 RAISES INDUSTRY CONCERNS

The Government of Curaçao proposed the introduction of a USD 75 tourist entry tax on non-resident air passengers, effective 1 January 2027. In response, IATA submitted formal comments highlighting concerns about the potential impact on travel demand, ticket affordability, charge transparency, and the destination's overall competitiveness. IATA will continue engaging with the government and other stakeholders to advocate for a balanced approach that supports both tourism growth and air connectivity while avoiding unnecessary cost burdens on travelers. For details, contact IATA's Area Manager for the Caribbean, Annaleen Lord.

MEXICO: INDUSTRY OPPOSES SENEAM CHARGES INCREASE

Mexico's 2027 Economic Package includes a 10% increase in SENEAM air navigation charges, raising significant concerns across the aviation industry. IATA and its member airlines oppose the increase due to inadequate consultation, limited transparency regarding the underlying costs, and the lack of a clear economic justification. In response, IATA engaged with government authorities to advocate for greater transparency, adherence to ICAO consultation principles, and a better understanding of the factors driving the proposal. As a result, SENEAM and the Secretariat of Infrastructure, Communications and Transportation (SICT) held discussions with airlines to explain the rationale for the increase and present Mexico's first long-term National Air Navigation Plan. However, IATA continues to oppose the proposed increase and urges the authorities to postpone implementation of the new fee until later in the year. For more details, please contact IATA's Country Manager for Mexico, Cintya Martinez.

PARAGUAY: UENO BANK RESOLUTION AND BILLING & SETTLEMENT PLAN (BSP) IMPACT

On 3 November, the Central Bank of Paraguay (BCP) dissolved Ueno Bank, one of the country's largest financial institutions with an estimated 2.9 million customers, following concerns related to solvency and alleged irregularities in lending practices. The developments triggered significant political repercussions, including a change in national leadership. Ueno Bank was linked to several IATA-accredited travel agents. Given the evolving situation and based on local market intelligence, IATA implemented Prejudice Collection of Funds (PcF) measures in accordance with Resolution 812, to protect airline settlement funds. As a result, the IATA-accredited travel agents identified as being controlled by the bank's majority shareholder group were suspended from participation in the BSP with immediate effect. IATA continues to support its member airlines with any inquiries to ensure airlines' funds are safeguarded. For more details, contact IATA's Regional Director, Financial & Distribution Services, Alicia Lines.

URUGUAY: CONSUMER PROTECTION LAW AND AIR TRANSPORT IMPLICATIONS

In October, Uruguay enacted Law No. 20,531, introducing changes to the country's consumer protection framework that may impact the online sale of air transport services beginning 1 January 2027. Key provisions include extending the consumer withdrawal period, requiring a dedicated "Withdrawal Button" on digital sales channels, and establishing new refund processing obligations. While Uruguay's Consumer Protection Unit (UDECO) has indicated that transport services booked before the effective date would be excluded from the new regime, uncertainty remains regarding how these provisions will apply to air transport. IATA is engaging with authorities to seek greater regulatory clarity, particularly in light of existing international aviation frameworks and operational considerations. For details, contact IATA's Area Manager for Argentina, Paraguay, and Uruguay, Maria Jose Taveira.

USA: IATA ADVOCATES FOR BALANCED AIRSPACE POLICY AS COMMERCIAL SPACE ACTIVITY EXPANDS

IATA is intensifying its engagement with U.S. regulators to ensure the continued safety and efficiency of aviation operations as commercial space activities accelerate. In comments submitted to the Federal Aviation Administration (FAA), IATA called for a balanced approach to the development of new spaceports and launch corridors that supports space sector growth while preserving the integrity of domestic and international air traffic flows. Building on this effort, IATA secured the backing of nine regional airline associations for a joint letter expressing concerns over SpaceX's proposal to significantly expand Starship-Super Heavy launch and landing operations at Boca Chica, Texas. IATA will also submit a detailed response to the FAA consultation process, reinforcing the industry's position that future airspace policies must support both aviation connectivity and emerging space transport activities. For more details, please contact IATA's Vice President, Member & External Relations, North America, Doug Lavin.