



Americas Focus

YOUR SOURCE FOR IATA'S LATEST REGIONAL ACTIVITIES

4

2025



Dear Colleagues,

April 19 marked the 80th anniversary of IATA, and I had the great honor of celebrating this special occasion at the Hotel Nacional de Cuba in Havana with the Cuban authorities in the very same room and setting as in 1945. From its early beginnings with 57 members in 31 nations to over 340 members in 120 nations in 2025, IATA's journey is a testament to the power of air transport in connecting the world while driving economic growth and social development. I would encourage you to read [Willie Walsh's thoughts](#) on this milestone for IATA and the global air transport community.

I am also pleased to share that IATA has been granted an OFAC license for Cuba. Effective immediately, our advocacy and engagement activities with the Cuban authorities and key stakeholders will be managed by our Caribbean Country Office based in Miami, and IATA's US based SMEs can also support our industry efforts in Cuba moving forward.

In a few weeks, the global airline community will once again come together for IATA's 81st Annual General Meeting (AGM) and World Air Transport Summit (WATS) which will take place on 1-3 June 2025. You can view all event details [here](#) and if you have any last-minute questions, please do feel free to reach out.

Prior to heading to New Delhi, I will be engaged in two key meetings with senior government officials across the region. In Guatemala, IATA will meet with President Bernardo

Arévalo to discuss infrastructure and capacity constraints at La Aurora International Airport, civil aviation law reform, airport governance, and airspace safety. Then I will head to Guyana to explore collaborative opportunities in the air transport sector and tourism with President Mohamed Irfaan Ali and senior ministers. If you have any specific items to be raised in these meetings, please let me know.

From an economic perspective, IATA's latest [passenger data](#) shows a 3.3% increase in global demand compared to March 2024. North American carriers experienced a slight -0.1% drop in demand, with capacity up 2.0% and a load factor of 83.0%. Latin American airlines saw a 7.7% increase in demand, a 12.1% rise in capacity, and a load factor of 80.9%.

Lastly, I am happy to share three key upcoming events in the region: First, the [CNS Partnership Conference](#) in Miami from May 13-15, then the 156th [IATA Slot Conference](#) in Vancouver, and finally, [Wings of Change Americas](#) in Bogotá on June 25 and 26. If you are unable to make it to the AGM, I hope to see you in Miami, Vancouver or Bogotá.

Please find below the latest IATA activities across the Americas and please let me know if you have any questions or ideas for follow up.

Thank you for your on-going support.



PETER CERDÁ

REGIONAL VICE PRESIDENT
THE AMERICAS



AIR PASSENGER MARKET IN DETAIL – MARCH 2025

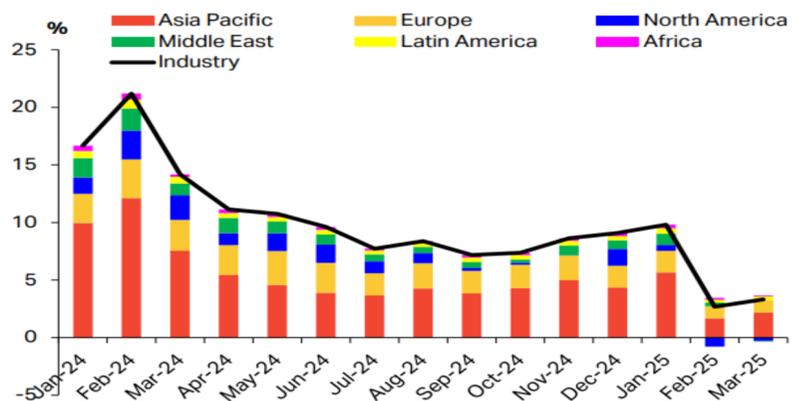
[DETAILS HERE](#)

MARCH 2025 (% YEAR-ON-YEAR)	WORLD SHARE ¹	RPK	ASK	PLF(%-PT) ²	PLF(LEVEL) ³
Total Market	100%	3.3%	5.3%	-1.6%	80.7%
Africa	2.2%	4.1%	5.0%	-0.6%	71.5%
Asia Pacific	33.5%	6.3%	5.9%	+0.3%	83.5%
Europe	26.7%	4.4%	6.4%	-1.5%	79.2%
Latin America	5.3%	6.2%	8.8%	-2.0%	80.8%
Middle East	9.4%	-0.7%	3.0%	-2.8%	74.7%
North America	22.9%	-1.1%	3.5%	-3.8%	81.4%

1) % of industry RPKs in 2024 2) Year-on-year change in load factor 3) Load Factor Level

REGIONAL CONTRIBUTION TO INDUSTRY-WIDE RPK GROWTH

MARCH 2025, YoY %. FULL ANALYSIS [HERE](#)



Sources: IATA S&E using data from IATA I&D - Monthly Statistics

ARGENTINA: KEY TAKEAWAYS FROM CHARGES CONSULTING MEETING WITH EANA



On April 24-25, an industry consultation meeting took place with top management from Argentina's ANSP EANA, airline representatives, IATA and JURCA. EANA presented their investment plan, operational information, challenges, and financial needs. The meeting aimed to enhance coordination and review the balance between domestic and international flight service fees. EANA was receptive to IATA's feedback, and all parties agreed on the importance of collaboration. It was decided to create a joint group to meet regularly, review improvement opportunities, and analyze cost structures. This initiative marks a significant step towards better cooperation and efficiency in the aviation sector. For details, contact IATA's Country Manager for Argentina, [Maria Jose Taveira](#).

BRAZIL: ADOPTION OF ELECTRONIC AIR WAYBILL (EAWB)



Brazil has made a significant leap towards modernization by adopting the Electronic Air Waybill (eAWB), a major milestone in streamlining air cargo processes and enhancing efficiency. The eAWB simplifies documentation, reduces paper usage, and accelerates cargo handling, benefiting airlines, shippers, and consumers by enabling faster delivery of packages and products. Brazil's commitment to innovation promises improved transparency and quicker transactions in the air cargo industry. This development aligns with global efforts to enhance sustainability and operational efficiency in air transport. For more details, please refer to IATA's [press release](#), and contact IATA's Assistant Director, External Relations, Brazil, [Marcelo Pedroso](#).

BOLIVIA: YPFB PLANS TO IMPORT FUEL AND CHARGE FOR ALL FUEL IN USD AS OF JUNE 20



Bolivia's main aviation fuel provider, YPFB, plans to start fuel imports in the second half of the year to ensure airlines are not facing fuel shortages. However, payments for these imports and all locally refined fuel will be charged in USD as of June 20 as the Central Bank lacks the dollars to support YPFB. IATA will voice its concerns to the authorities and advocate for continued acceptance of local currency (BOB). In more positive news, IATA's ICCS service is performing effectively, with the backlog nearly cleared. For more details, please contact IATA's Area Manager for Peru and Bolivia, [Martín La Rosa](#).

BRAZIL: MEETING WITH DECEA TO IMPLEMENT STRUCTURED CONSULTATION PROCESS



On April 16, IATA met with the Chief Financial Officer and Chief Operating Officer of DECEA, Brazil's Air Navigation Service Provider, to voice concerns about the high ANSP fees and propose a structured consultation process. DECEA consented to present its charge structure, investment plans, and Air Traffic Control system performance at a subsequent meeting in May. IATA will provide more details once the meeting is scheduled and will persist in advocating for transparent and equitable pricing for airlines. For more details, please contact IATA's Senior Manager for Airport and ANSP Charges for the Americas, [Guillermo Rodriguez](#).

CANADA: FEEDBACK ON TRANSPORT CANADA'S SAF BLUEPRINT



IATA has provided feedback on Transport Canada's consultation for Canada's SAF blueprint. Key considerations include establishing tax credits, grants, and subsidies to support SAF production and adoption, linked to ICAO's Long-Term Aspirational Goal (LTAG). The blueprint also emphasizes leveraging local feedstocks and collaborating with provincial governments and indigenous communities, encouraging innovation without favoring specific production pathways, and setting achievable SAF production goals based on Canada's capacity and resources. Additionally, creating a regulatory environment that fosters competition and prevents monopolistic practices is crucial. These measures aim to position Canada as a leader in sustainable aviation and contribute to global carbon emission reduction efforts. For more details, please contact IATA's Senior Manager, Sustainability, [Pedro de la Fuente](#).

COLOMBIA: POTENTIAL DELAYS IN MIGRATION PROCESSES AT INTERNATIONAL AIRPORTS



On May 9, IATA [warned](#) of potential delays in migration processes at Colombia's international airports. Due to announcements by Migration Colombia unions, passengers may experience extended wait times at El Dorado International Airport in Bogotá and other international terminals. IATA advised passengers to check flight status in advance, follow official airline and airport communications, and arrive earlier than usual. Enrolling in the Biomig system and using its machines is also recommended. Identified delays could affect security checks, migration processes, check-in, baggage inspection, and boarding, impacting airport efficiency and flight punctuality. IATA is collaborating with airport operators, airlines, and authorities to resolve the situation and maintain national aviation stability and passenger connectivity. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).

CUBA: ELIMINATION OF USD 30 SANITARY FEE & IMPLEMENTATION OF ELECTRONIC VISA SYSTEM



In 2020, the Government of Cuba introduced a \$30 USD sanitary fee, which will be eliminated effective May 1, 2025, as announced by the Minister of Tourism, though the official regulation is pending publication. IATA is collaborating with Cuban authorities on this matter. Additionally, starting July 1, 2025, Cuba will implement an electronic visa system to replace the traditional tourist card. While this modernization is welcomed, IATA has raised concerns about the payment process and transition period, advocating for the continued availability of the physical tourist card during the initial phase to ensure a smooth transition for passengers. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

ECUADOR: INDUSTRY SUBMITTED COMMENTS TO SHAPE CIVIL AVIATION LAW REFORM



As part of the agreements reached with the Vice-president Elect of Ecuador, the government shared with the industry the draft bill to reform the country's civil aviation law. The bill addresses topics such as fare registration, charges, refunds, passenger rights, denied boardings, unruly passengers, and sanctions for non-compliance, among others. IATA, ALTA, and the local airline association ARLAE reviewed the proposed text and presented comments on May 9 to ensure it aligns closely with industry expectations. For more details, please contact IATA's Area Manager for Central America and Ecuador, [David Hernandez](#).

MEXICO: RECOVERY OF AICM CAPACITY



On May 7, the Mexico City International Airport (AICM) Operations and Schedules Committee held an Extraordinary Session, announcing plans to recover operational capacity to 44 operations per hour, up from the current 43. A working group, including airlines, AFAC, and IATA, will be formed to determine the procedure and criteria for allocating the recovered capacity, with meetings likely starting next week. The AICM Director informally confirmed the government's aim to increase capacity by May 15. IATA recommends a phased implementation, ensuring proper scheduling, objective criteria, prioritizing international carriers, and transparency. Next steps include consensus with airlines, participation in working groups, and agreement in the correct way to allocate the additional capacity. For more details, please contact IATA's Country Manager for Mexico, [Cintya Martinez](#).

MEXICO: CARGO AGENCY CONFERENCE (CAC/52) ADOPTED CASS MEXICO DOMESTIC PROPOSAL



Cargo Agency Conference (CAC/52) voted to adopt the reintroduction of Domestic CASS in Mexico. With the support of Aeromexico, Volaris and Viva, AMACARGA, and a group of freight forwarders, IATA will start pilot testing in CASSlink before moving to full market implementation in Q4 of 2025. The new operation will introduce Flexpay into the market which is a feature within CASS that allows for prepayment options for settlement. For details, please contact IATA's Regional Cargo Manager, [Rigoberto Lopez](#).

PERU: CONCERNING CONSUMER PROTECTION BILLS UNDER CONSIDERATION



Various consumer protection bills under consideration could severely impact domestic airlines, including free ticket endorsements for domestic flights and prohibitions on fees for hand luggage and seat selection. IATA and partner associations are opposing these proposals through congressional engagement and formal comments. Due to the negative precedent that these proposals imply to the industry, IATA will keep the advocacy efforts with the Government and the Congressmen supporting these bills. For more details, please contact IATA's Area Manager for Peru, [Martín La Rosa](#).

UNITED STATES: DOT AND FAA ANNOUNCED PLAN TO MODERNIZE ATC SYSTEM



On May 8, the US Department of Transportation and Federal Aviation Administration [announced a plan](#) to modernize the air traffic control system in the US by building new facilities to replace outdated control towers and TRACON centers. Key initiatives include upgrading to IP networks, replacing radios and voice switches, replacing airborne and surface radars, deploying surface awareness systems at 200 airports, and building new air traffic control centers, towers, and TRACONs, amongst others. IATA is fully supportive of this effort, and forms part of the Modern Skies coalition with over 50 organizations, who called for ATC modernization efforts in a [joint letter](#) on April 29. For details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

UNITED STATES: A4A & IATA TO SUBMIT COMMENTS TO DOJ ANTICOMPETITIVE REGULATIONS TASK FORCE



The US Department of Justice (DOJ) has formed an Anticompetitive Regulations Task Force to identify and potentially eliminate anticompetitive state and federal laws across various sectors, including transportation. IATA is collaborating with Airlines for America to submit robust comments defending joint ventures and antitrust immunity for member airlines. Comments should be submitted to the task force docket by May 26. For details, contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).