

Dear Colleagues,

As the peak Northern summer travel season comes to an end, demand surged across all regions. North American carriers saw a 5.3% year-on-year increase in demand while Latin American airlines saw a 13.4% increase. Globally, the industry achieved an impressive average load factor of 86% in both domestic and international operations. While operating at such high load factors is beneficial, it also presents challenges as it underscores the necessity for all stakeholders across the supply chain to maintain high efficiency levels to minimize delays and ensure travelers reach their destinations on time.

Small disruptions in the supply chain can have devastating domino effects on the sector which we just experienced in Colombia over the past few days. Fortunately, the impact was minimized when the Colombian government confirmed that suppliers will have sufficient jet fuel to service aircraft at their key international airports. The impact would have negatively affected thousands of passengers if airlines were forced to cancel their flights due to the fuel shortage and we urged the authorities for a comprehensive review of the nation's aviation fuel import policy.

Last month, I had the pleasure to meet with several members of the new Panamanian Government to underscore the importance of aviation, opportunities to grow tourism and discuss the challenges of the industry in the country. I was very encouraged with the government's

commitment to safeguard Panama's competitive advantage by stimulating more connectivity and enhancing the infrastructure while keeping costs competitive. We also shared IATA's latest [economic analysis](#), highlighting the benefits tourism and air transport generate in Panama. I look forward to working with the new authorities to utilize aviation as a powerful catalyst for Panama's socio-economic growth.

Lastly, we have two key events coming up in the region: First, the [Aviation Day Argentina](#) on September 5 in Buenos Aires where industry leaders and policymakers will discuss the future of aviation in Argentina and exchange ideas on the many opportunities air transport faces in the country in the years to come.

Then, IATA's second [World Sustainability Symposium \(WSS\)](#) will take place in Miami on September 24-25 and focus on actions needed to achieve the airline industry's commitment to net-zero CO2 emissions by 2050. I hope to see many of you in Buenos Aires and Miami in the coming weeks.

As usual, please find IATA's latest activities across the Americas below. Please do not hesitate to reach out with any questions or ideas for further follow up.

Thank you for your on-going support.



**PETER CERDÁ**  
REGIONAL VICE PRESIDENT  
THE AMERICAS



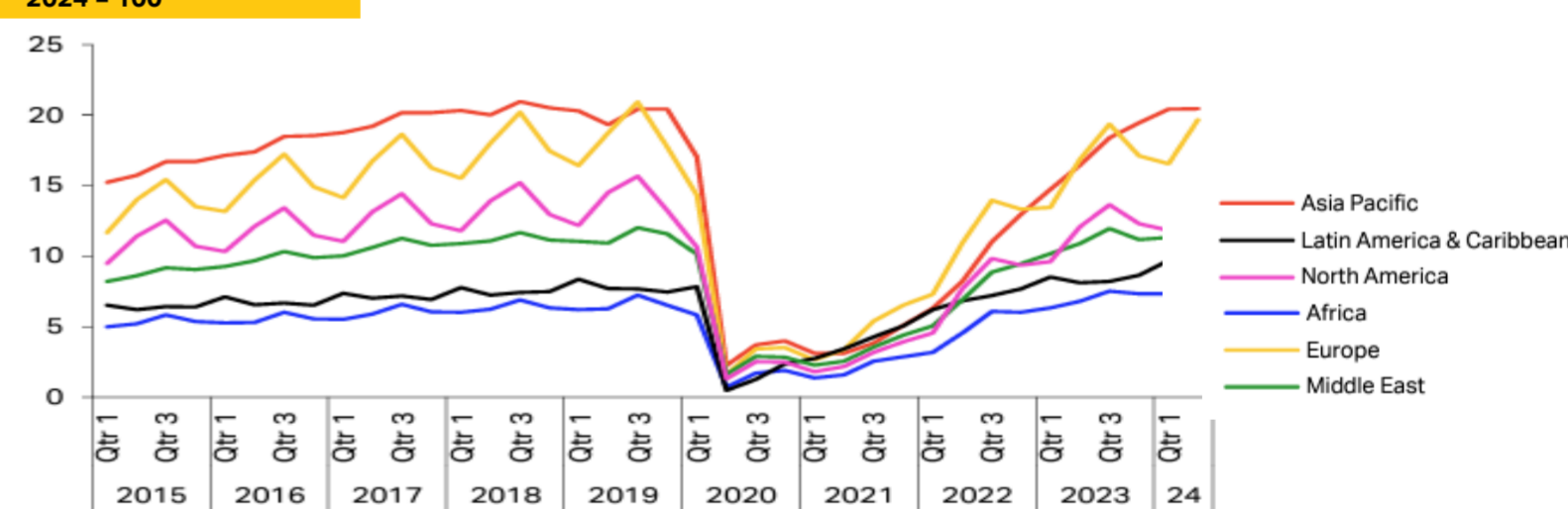
## GLOBAL AIR PASSENGER MARKET IN DETAIL

FULL ANALYSIS [HERE](#)

JULY 2024 (% YEAR-ON-YEAR)	WORLD SHARE <sup>1</sup>	RPK	ASK	PLF(%-PT) <sup>2</sup>	PLF(LEVEL) <sup>3</sup>
<b>Total Market</b>	<b>100%</b>	<b>8.0%</b>	<b>7.4%</b>	<b>+0.5%</b>	<b>86.0%</b>
Africa	2.1%	6.6%	5.8%	+0.6%	75.0%
Asia Pacific	31.7%	12.0%	9.8%	+1.6%	83.4%
Europe	27.1%	7.2%	7.0%	0.1%	88.2%
Latin America	5.5%	7.5%	8.4%	-0.7%	86.2%
Middle East	9.4%	6.1%	5.5%	+0.5%	84.0%
North America	24.2%	4.9%	5.1%	-0.2%	88.9%

## INTRA REGIONAL AIR CONNECTIVITY INDEX

2024 = 100



## ARGENTINA: EANA ESTABLISHED 22.3% INCREASE IN INTERNATIONAL ANSP CHARGES

Civil Aviation Authority ANAC passed Resolution 208/24 establishing a 22.3% increase on EANA's ANSP charges applicable to international flights only. The increase not only places Argentina as one of the most expensive countries in terms of navigation charges for international operations but also widens the gap existing with charges applicable to domestic ones. During a meeting with EANA, IATA voiced the industry's concern and requested to start a consultation process, with participation of airlines, to review in detail the infrastructure and technology investment plan. The consultation meeting will take place on September 16 and 17, and airlines are encouraged to attend. For more details, please contact IATA's Country Manager for Argentina, [Maria Jose Taveira](#).



## BRAZIL: PLAN TO INTRODUCE VAT ON INTERNATIONAL FLIGHTS DISMISSED

Thanks to joint industry advocacy efforts, the government's plan to introduce VAT on international flights leaving Brazil was finally dismissed. In addition (and with the support of ANAC), IATA continues to press for more precise language to provide greater clarity to the provision that grants exemptions to international flights under international agreements and reciprocity factors (Art. 288 of Bill 68/2024). This supplementary law has already been voted by the Lower House and is now under review by the Senate. If the Senate does modify/enhance Art. 288 as proposed by IATA and JURCAIB, the law will pass to the Lower House again for its review. The expected timeline for Senate to review is approximately 2-3 months, with the expectation to have it finalized by year end. For more details, please contact IATA's Country Manager for Brazil, [Dany Oliveira](#).



## BRAZIL: USD 1.1 BILLION FUNDING FOR SAF DEVELOPMENT

Brazil's development bank, BNDES, in conjunction with the government funding agency, has authorized a total of \$6.6 billion reais (USD 1.1 billion) for the local advancement of sustainable fuel projects intended for aviation and maritime use. IATA is currently seeking a meeting with BNDES to understand better how airlines could benefit from these funds. For more details, please contact IATA's Senior Manager, External Affairs & Sustainability, [Pedro de la Fuente](#).



## CANADA: CTA BULLETIN ON PERSONS WITH DISABILITIES TRAVELING BY AIR



On 16 August, the Canadian Transportation Agency (CTA) issued a bulletin ([En](#)) ([Fr](#)) reminding airlines of the rights of Persons with disabilities traveling by air and airlines' responsibilities in the application of the [Accessible Transportation for Persons with Disabilities Regulations](#) (ATPDR) regulation. We recommend that you stay abreast of the content and please contact IATA's [Linda Ristagno](#) or [Attila Ulku](#) for any questions you might have.

## CANADA: STUDY ON COMPETITION IN PASSENGER AIR TRAVEL SERVICE



Competition Bureau  
Canada

On July 29, the Competition Bureau Canada launched a market study consultation of competition in passenger air travel service in Canada. As part of the consultation, IATA submitted comments regarding barriers to entry and expansion highlighting concerns regarding high government-imposed taxes, fees, and charges, and requested that the Competition Bureau focuses its study on reducing or removing these government-imposed impediments to an economically sustainable Canadian air transportation system. For details and a copy of the IATA submission, please contact IATA's Vice President, Member & External Relations, [Doug Lavin](#).

## COLOMBIA: NEW BILL INTENDS TO IMPOSE LIMITS ON BAGGAGE FEES ON DOMESTIC FLIGHTS



A new bill was introduced in Colombia's Congress intended to impose a limit on what may be charged by an airline for the carriage of a piece of luggage, to a maximum of 10% of the value of the cheapest fare the airline offers on each frequency within a route, including taxes, charges, and other fees. This would only apply for domestic services. However, given that this could set a highly problematic precedent, IATA has engaged with the members of Congress proposing the bill and will provide written comments to be considered in congressional discussions, which IATA will continue to monitor. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).

## CHILE: PROPOSED BILL TO ELIMINATE CHARGE FOR CARRY ON BAGGAGE



A new bill was proposed in Congress that, if approved, would eliminate airlines' abilities to charge for carry-on baggage and would also establish a standard size and weight for the type of baggage. This bill would only apply for domestic services. However, IATA and ACHILA are reviewing the text, and given the relevance of the potential detrimental precedent, the associations intend to submit comments to be considered during congressional discussions. IATA will continue to monitor developments. For more details, please contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).

## CHILE: NEW WHEELCHAIR ASSISTANCE PROCEDURES AT SCL INCONSISTENT WITH IATA'S RECOMMENDATIONS



Santiago airport's concessionaire recently proposed new wheelchair assistance procedures that are inconsistent with IATA's recommended best practices. The significant challenge inherent in the proposal is that wheelchair assistance would only be provided by the airport up to the boarding gate instead of the aircraft door. IATA, ACHILA and airlines submitted letters to the concessionaire indicating that airlines would not accept responsibility for any consumer complaints about unsafe or undignified assistance experiences if the airport proceeded with implementing the new procedures. Recently, IATA received a response from the Fiscal Inspector in Chile, instructing the concessionaire to maintain the current wheelchair assistance services until 31 December 2024. IATA will continue monitoring these developments and proactively engage with the relevant authorities to ensure future procedures consider industry best practices and do not affect disability rights. For more details, please contact IATA's Manager, External Affairs, Latin America and the Caribbean, [Alejandro Restrepo](#).

## NICARAGUA: IATA'S BSP CEASED OPERATIONS



As a result of Ministerial Accord No. 38 of the Ministry of the Interior published in Official Gazette on August 19, 2024, IATA's BSP ceased operation in Nicaragua until further notice. IATA is assessing options to continue operations in the future. For more details, please contact IATA's Area Manager for Central America, [David Hernandez](#).

## PERU: ONGOING DISCUSSIONS ON OPENING DATE OF NEW LIM AIRPORT



On August 19, IATA met with the Premier's Chief Advisor to discuss the proposed opening date for newLIM, expressing the industry's concerns and requesting a delay until the end of January or later. The government was open to this change and committed to arranging a new meeting with the Premier and Lima Airport Partners (LAP) to compare positions. IATA also addressed the potential impact of increased charges on the industry and passengers due to the transfer of investment costs for newLIM, estimated at over US\$ 2 billion. Despite our concerns, Addendum 8 to the LIM concession contract was signed swiftly without considering the industry's requests. IATA and AETAI sent a letter to the Premier highlighting the industry's concerns. For more details, please contact IATA's Country Manager for Peru, [Martin la Rosa](#).

## THE BAHAMAS: SUMMARY OF THIRD AND FINAL BANSA CONSULTATION



On August 27, BANS held its final consultation on the new air navigation charges in the Bahamas. They provided updates on planned investments and clarified the rates adjustment mechanism. BANS extended the deadline for airlines to settle RP1 (2021-2024) payments to September 14, with outstanding amounts added to RP2 (2024-2029) charges. The new scheme starts on October 1, 2024. IATA expressed concerns about the O/D fee cost base and is gathering further comments. The charging scheme remains largely unchanged to what was initially proposed, the investment plan lacks dedicated consultation, and there is disagreement on the proposed O/D service charges. BANS acknowledged the industry's concerns but is unable to make further adjustments, committing instead to reductions in RP3. As a follow up, IATA seeks comments from airlines by September 3 for further action jointly coordinated with A4A. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).

## UNITED STATES: NOTICE OF PROPOSED RULEMAKING ON FAMILY SEATING



On August 1 the Department of Transport (DoT) published a Notice of Proposed Rulemaking (NPRM) on family seating. The proposed rule would require carriers to ensure that any accompanied passenger aged 13 or under be seated next to at least one accompanying adult at no extra cost. In addition, the proposed rule includes a section entitled "Inclusion of Fees for Basic Services in Advertised Fare" which does not relate to family seating but effectively contemplates a complete roll-back of pricing freedoms, specifically the freedom to unbundle the airline product and sell ancillaries. IATA is preparing comments by the closing date of 8 October. For more details and a sample letter, please contact IATA's Vice President, Member & External Relations, [Doug Lavin](#).

## IATA: WEBINAR ON DATA PROTECTION AND INTERNATIONAL CARRIAGE BY AIR



IATA invites you to join a free webinar to introduce the recently published [White Paper on Data Protection and International Carriage by Air](#) on 3 October at 14:00 CET (Central European Time). Experts from IATA, its member airlines and leading global privacy lawyers will help members gain essential insights into: Types of personal data that airlines handle to facilitate international carriage, some of the key challenges that international airlines face, high level recommendations on the way forward and next steps, and recent developments at ICAO. The event is focused on senior management including legal, data protection and privacy and facilitation experts in civil aviation authorities and ministries of transport, council members and representatives to ICAO, ICAO Secretariat and airlines and other aviation related organizations. Please complete the registration form [here](#).