



# Americas Focus

YOUR SOURCE FOR IATA'S LATEST REGIONAL ACTIVITIES

3  
2025



## Dear Colleagues,

The recent power outage at London Heathrow imposed enormous costs on airlines in terms of passenger care and assistance, estimated at GBP60-100 million. This incident immediately reminded me of the 2024 outage impacting Lima Airport in Peru, which was caused by a circuit in the electrical system, resulting in the closure of the airport and flights being diverted to other airports in Peru and in neighboring countries such as Chile, Colombia and Ecuador. These type of incidents highlight a systematic flaw as current consumer protection regulations leave airlines on the hook for situations completely outside of their control and do not provide any incentives for other actors in the value chain to put in place measures to ensure resilience.

IATA has stepped up its calls for shared responsibility. Consumer protection regimes such as EU261 and Canada's APPRs do not work because they simply punish airlines without doing anything to improve network performance. Authorities across the Americas should not attempt to copy the failed European and Canadian approaches, a topic we will further discuss at the upcoming [Wings of Change Americas Conference](#) in Bogota on June 25 and 26.

In addition, airports and other airline partners, whether ground handling or software providers, must have sound and tested contingency plans in place. To address the quality of ground operations, IATA integrated IATA Safety Audits for Ground Operations (ISAGO) registered and accredited service providers into the complimentary [IATA ONE Source](#) platform, highlighting companies who have

achieved certification of excellence and compliance capabilities, such as CEIV Pharma, Fresh, IEnvA, and others.

On the sustainability front, IATA [announced](#) the creation of the Civil Aviation Decarbonization Organization (CADO) to independently manage the upcoming Sustainable Aviation Fuel (SAF) Registry, ensuring transparency and trust among stakeholders. Participation will be free until April 2027, after which it will be operated on a cost recovery basis.

From an economic perspective, IATA's [latest passenger data](#) shows a 2.6% increase in global demand compared to February 2024. North American carriers saw a 1.5% decline in demand, with capacity down 3.2% and a load factor of 78.9%. Latin American airlines experienced a 6.7% increase in demand, with capacity up 9.9% and a load factor of 81.7%.

In regional news, the Confederation of Unions in Argentina has announced a General Strike for April 10, with over 40 unions participating, including key aviation unions. This will impact services at all airports in Argentina and IATA is working with ANAC and airlines to prepare accordingly.

As usual, please find below the latest IATA activities across the Americas. Please let me know if you have any questions or ideas for follow up. Thank you for your support.



**PETER CERDÁ**  
REGIONAL VICE PRESIDENT  
THE AMERICAS



## AIR PASSENGER MARKET IN DETAIL – FEBRUARY 2025

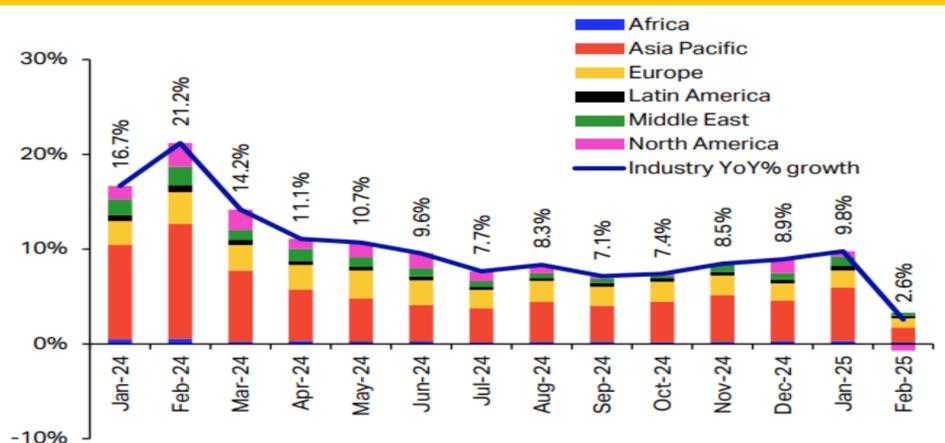
[DETAILS HERE](#)

FEBRUARY 2025 (% 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>2.6%</b>	<b>2.0%</b>	<b>+0.4%</b>	<b>81.1%</b>
Africa	2.2%	6.8%	4.7%	+1.5%	75.4%
Asia Pacific	33.5%	4.2%	2.7%	+1.3%	85.4%
Europe	26.7%	4.3%	3.9%	+0.3%	76.7%
Latin America	5.3%	4.6%	5.6%	-0.8%	81.6%
Middle East	9.4%	3.3%	1.3%	+1.6%	82.0%
North America	22.9%	-3.2%	-1.9%	-1.1%	79.0%

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

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



## ARGENTINA: ALIGNING PROPOSED AIRPORT COORDINATION REGULATION DRAFT TO WASG



On March 20, IATA met with Hernán Gómez, the Undersecretary of Air Transportation, to review the government's proposed draft airport coordination regulation, with the aim of aligning it with the Worldwide Airport Slot Guidelines (WASG). The outcome was positive, as the government decided to issue a temporary regulation that will align Argentina with key WASG principles for Level 2 airports. Initially, the regulation will only be applied at Aeroparque Airport (AEP) through the end of the 2026 Summer Season, as AEP is the airport with most pressing need to be facilitated. We expect a more definitive regulation to be issued as of October 2026, which will provide broader alignment with WASG principles, including the coordination and facilitation processes, amongst other factors that we agreed to collaboratively address. For details, contact IATA's Country Manager for Argentina, [Maria Jose Taveira](#).

## BRAZIL: UPDATE ON E-VISA IMPLEMENTATION



In response to the new visa requirements for passengers from the U.S., Canada, and Australia, effective April 10, 2025, IATA engaged with Brazilian authorities to ensure operational continuity and compliance for airlines. On 18 March, the Federal Police confirmed that on-duty crew listed on the GENDEC are exempt from visa requirements, while positioning crew need documentation proving their flight duties. Mechanics and maintenance personnel will require official visas. Official communication on these procedures will be issued in April. Simultaneously, the Senate approved a bill to suspend the visa mandate, which now moves to the Lower House for debate. However, the Ministry of Foreign Affairs opposes the bill, citing reciprocity principles so we expect the visa requirement to become effective on April 10. For more details, please contact IATA's Assistant Director, External Relations, Brazil, [Marcelo Pedroso](#).

## CANADA: IATA SUPPORTS CANADA'S DACCS PROTOCOL TO ENHANCE AIRLINE INDUSTRY'S EMISSION REDUCTION EFFORTS

IATA responded to Canada's Ministry of Environment and Climate Change regarding the Direct Air Carbon Dioxide Capture and Geological Storage (DACCS) protocol. Emphasizing the airline industry's commitment to reducing greenhouse gas emissions, IATA supported the DACCS protocol as part of Canada's Greenhouse Gas Offset Credit System. The industry addressed questions about cross-border CO2 transport, renewable energy procurement, construction GHG emissions, and CO2 capture from project emissions. IATA recommended defining renewable energy additionality through Power Purchase Agreements and Energy Attribute Certificates, starting with annual matching for renewable energy consumption, and excluding construction emissions unless for exclusive-use facilities. They also suggested accounting for point source CO2 capture in project emissions but not crediting it in the federal offset program. For more details, please contact IATA's Senior Manager, Sustainability for the Americas, [Pedro de la Fuente](#).



## CHILE: IATA URGES SCL AIRPORT TO MAINTAIN QUALITY ASSISTANCE FOR PASSENGERS WITH REDUCED MOBILITY

IATA has [expressed concern](#) over the new ground assistance process for passengers with reduced mobility (PRM) or disabilities at Santiago International Airport (SCL). Starting in July, the concessionaire Nuevo Pudahuel will no longer handle passenger transfers between the gate and the aircraft, leaving this responsibility to the airlines. IATA emphasizes the need for a collaborative approach to improve current services, advocating that the concessionaire should remain solely responsible for assistance throughout the airport process. This ensures quality and reduces complexity, safeguarding passenger safety and dignity. IATA requested the Ministry of Public Works to intervene and called for adherence to ICAO Annex 9, recognizing the essential nature of accessible services for PRM and remains committed to working constructively with authorities and the concessionaire. For more details, please contact IATA's Country Manager for Chile, [Helen Kouyoumdjian](#).



## COLOMBIA: CONSUMER PROTECTION BILL UNDER DISCUSSION

On 4 March, Colombia's Congress discussed in the second debate in the Senate the bill that proposes, amongst others, the prohibition of overbooking, additional compensation in case of delays and cancellations, and the control of tariffs in exceptional cases. IATA shared the industry's concerns and positions on each of the proposals and highlighted the unintended consequences to passengers if the bills get approved. The Senate decided to study all comments presented on the text by the different stakeholders and other Senators, and will propose an updated text to be discussed. If the proposed text is approved, IATA will continue to advocate against it in upcoming discussions in Congress during the two additional debates on the proposal. For more details, please contact IATA's Assistant Director, External Affairs, Latin America & Caribbean, [Alejandro Munoz](#).



## COLOMBIA: PROPOSED LABOR REFORM ARCHIVED

The labor reform proposed by Colombia's national government was archived by the Senate's Seventh Commission this month, following its approval in the lower house during the first and second readings. This bill would have significantly increased labor costs for airlines through higher nighttime and weekend surcharges. The non-approval of this reform prevents these immediate cost increases. However, the national government has announced its intention to call for a Popular Consultation, allowing the electorate to decide on the implementation of these labor changes and other legal reforms. This consultation process is expected to take several months to gain approval. For more details, please contact IATA's Country Manager for Colombia, [Paula Bernal](#).



## COSTA RICA: GOVERNMENT EXPRESSES INTEREST IN WASG MODEL REGULATION

As a result of the increase in operations, the government of Costa Rica has formed a working group to explore slot coordination in its two main international airports: San Jose's Juan Santamaria International Airport (IATA: SJO) and Liberia's Daniel Oduber International Airport (IATA: LIR). IATA has engaged with the authorities to ensure that international standards are incorporated into any regulations by sharing similar legislative models from other countries and actively participating in discussions with the regulator. The final draft of the regulation is expected to be shared with airlines in April. For more details, please contact IATA's Assistant Director, External Affairs, Latin America & Caribbean, [Alejandro Munoz](#).



## GUYANA: POSITIVE RESPONSE FROM REVENUE AUTHORITY

On 7 March, IATA received the official response from the Guyana Revenue Authority (GRA) regarding the concerns raised by our members pertaining to the Travel Voucher tax (GY) and Travel Tax (I4). The GRA will now allow for the monthly filing of both taxes and no longer require airlines to link separate transactions between ticket sales and ancillary services, nor provide supporting documentation for exemptions. IATA is pleased that these adjustments will ease the administrative burden related to airline compliance with tax processes. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).



## PERU: POSTPONEMENT OF THE INAUGURATION OF THE NEW LIM TERMINAL

Following the government's decision to postpone the new Lima airport's inauguration, originally set for March 30, due to safety and efficiency concerns, IATA's airport development specialist confirmed issues such as insufficient stress tests, inadequate personnel training, unresolved system failures, and lack of fuel plant authorizations in a site visit. IATA issued a [joint press release](#) with ALTA and AETAI and met with the Minister of Transport to express industry support and our willingness to collaborate for a timely opening. A new opening date has not been announced. IATA also urged for the new runway and tower to be utilized more efficiently as soon as possible to expand the airport's capacity by year-end. For details, please contact IATA's Area Manager for Peru, [Martín La Rosa](#).



## THE BAHAMAS: UPDATE ON BANSА AIR NAVIGATION CHARGING SCHEME

During BANSА's fourth consultation meeting on March 5, a revised charges scheme was proposed, including a compensation mechanism to address over- or under-recoveries. This is being discussed bilaterally with airlines operating in Bahamian airspace. BANSА suggested adopting a clean slate approach for the financial period 2025–2029. In response, IATA submitted a formal letter to the authority, raising concerns about the proposal. These concerns were further discussed during IATA's regional charges meeting on March 20, attended by airline charges SMEs. Key issues include RP1 calculation methods, RP2 impacts, and the need for a review of BANSА's air navigation structure or an independent audit before RP2 implementation. IATA also stressed the importance of a balanced charging scheme that aligns with the industry's needs and reflects BANSА's service costs under the FAA/BANSА agreement. For more details, please contact IATA's Area Manager for the Caribbean, [Annaleen Lord](#).



## UNITED STATES: IATA ADVOCATES FOR REGULATORY REVIEW TO STREAMLINE AIRLINE OPERATIONS

IATA wrote to CDC Acting Director Susan Monarez regarding Executive Order 14219, which mandates regulatory review. IATA highlighted two regulations for review: the importation of dogs and cats, and contact tracing. While supporting CDC's efforts to prevent rabies, IATA argues against the requirement for air waybills (AWBs) for dogs transported by passengers, suggesting reopening the rulemaking to remove this requirement. For contact tracing, IATA questions its effectiveness post-pandemic and suggests that CDC should sunset its order once CBP's proposed rule for collecting similar data via the Advanced Passenger Information System (APIS) is finalized. This would streamline processes and reduce costs for airlines. For more details, please contact IATA's Vice President, Member & External Relations, North America, [Doug Lavin](#).

