ICAO NAM/CAR/SAM Workshop on Airport and Air Navigation Services User Charges

Mexico City, August 2026

Supporting Connectivity Through Efficient, Transparent and Sustainable Charging Frameworks

Why are we here?

- Aviation creates value through connectivity, tourism, trade, investment and jobs.
- Charges influence affordability, competitiveness and connectivity.
- States, Regulators, Airports, ANSPs and Airlines are essential partners.

"The objective is not just lower charges."

The objective is sustainable charging frameworks that support aviation growth.

Airlines continue to operate on thin margins

Net profit of USD 7.9 per passenger underscores the need for cost-efficient airport and ANSP services

Region	2025	2026F
Middle East	28.9	28.6
Europe	10.6	10.9
North America	9.5	9.8
Latin America	7.3	5.7
Asia Pacific	3.3	3.2
Africa	1.4	1.3
Industry	**7.9**	**7.9**

Airport and ANSP charges must remain affordable and cost-based

- Airport and ANSP charges account for approximately 15-16% of global air transport costs
- Airlines earn an average net profit of only USD 7.9 per passenger in 2026
- Effective economic regulation is required to prevent excessive charges and inefficient investment.
- Cost efficiency, transparency, meaningful consultation, and adherence to ICAO charging principles remain critical to protecting airline affordability and connectivity

A New Phase of Aviatic..
Infrastructure Development

- Airports: expansion, sustainability and capacity investment.
- ANSPs: ATM modernization, digitalization, cybersecurity and automation.
- States: infrastructure financing needs and economic development goals.
- Airlines: maintaining affordability and connectivity.

What airlines support

- ✓ Airport expansion
- ✓ ATM modernization
- ✓ Sustainability initiatives
- ✓ Infrastructure resilience
- ✓ Capacity growth
- ✓ Digitalization
- ✓ Reasonable returns

Provided that investments are:
Justified
Efficient
Demand-driven
Transparent
Developed through consultation

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Evolution of Airport Charges

Airports are facing investment requirements
Capacity expansion programs
New terminals and airfield developments
Sustainability and resilience investments
Increasing financing costs
Greater participation of private capital

Airlines are increasingly observing
Growth in airport charging requirements
More frequent charges increases or new fees
Greater focus on CAPEX recovery
Increased scrutiny of investment efficiency
Increased importance of economic regulation and consultation

- Airlines support airport investment. The key issue is ensuring that investments are justified, efficient, demand-driven and developed through meaningful consultation.

Evolution of ANSP Charges

ANSPs are undergoing modernization
ATM modernization programs
Digitalization transformation projects
Cybersecurity investments
Communications and surveillance upgrades
Workforce development requirements

Airlines are increasingly observing
Pressure on ANSP cost bases
New investment recovery requirements
Greater focus on service performance
Increased emphasis on transparency and accountability
Rising importance of consultation with users

- Airlines support ANS modernization. The key issue is ensuring that operational and technological improvements translate into better performance, efficiency and value for users.

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Infrastructure needs conti... to increase

Airports and ANSPs are increasingly seeking funding to support:
Capacity expansion and congestion relief
Modernization of aging infrastructure
Sustainability and resilience initiatives
Digital transformation programs
Service quality improvements

Policy questions become important
Are investments being triggered by demonstrated demand?
Are alternatives and business cases being properly evaluated?
Are costs being efficiently incurred and allocated?
Are users provided with sufficient information to assess proposals?
Are risks being appropriately allocated between investors and users?

- The objective is to ensure that infrastructure development remains efficient, affordable and aligned with long-term connectivity needs.

A Key Question

- How can States, regulators, airports, ANSPs and airlines ensure affordability, connectivity, accountability and efficient cost recovery as infrastructure requirements continue growing?

ICAO provides the answer

ICAO has already established a robust framework through:

Article 15	ICAO Doc 9082	ICAO Manuals (9562/9161)

The challenge is the implementation:

Principle	**Desired Outcome**
Cost-relatedness	→ Efficient cost recovery
Transparency	→ Accountability
Consultation	→ Better decisions
Non-discrimination	→ Fair treatment

"The issue is not creating new principles. The issue is applying existing principles consistently."

Challenges Observed Across Charging Frameworks

Airlines continue to observe situations where
Consultation occurs after decisions have been made
Information provided to users is insufficient
Charging structures complex and difficult to assess
Investments proceed ahead of demonstrated traffic demand
Cost overruns and project risks are transferred to users
Regulatory review mechanisms are limited or unavailable

Potential consequences
Higher user charges
Reduced affordability
Greater pressure on airline business models
Lower confidence in decision-making processes
Risks to connectivity and long-term traffic growth

- Strengthening implementation of existing ICAO principles remains one of the most effective ways of addressing these challenges.

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Financing, Ownership and Economic Regulation

- Privatizations, concessions, Public-Private Partnership (PPPs) and corporatized structures continue evolving.
- Private ownership does not eliminate market power.
- Effective economic regulation remains essential regardless of ownership model.

Economic Regulation as an Enabler

Users	Transparency, predictability, protection from inefficient costs.
Providers	Credibility and stability.
Investors	Regulatory certainty and reduced disputes.
States	Better investment outcomes.

Key aspects

- 1. Establish a regulator

Independent of the airports and the State
With sufficient resources (manpower and financial)
Empowered (including powers over concession agreements)
Quality of Service, Investments, Efficient Operating Expenses, Power to set Charges

- 2. Ensure ICAO policies are respected

Transparency, Consultation, Cost-relatedness, and Non-Discrimination

- 3. Adapt regulation as needed based on market power

Greater market power requires stronger economic regulation

Working together for bet
outc

What can States do?

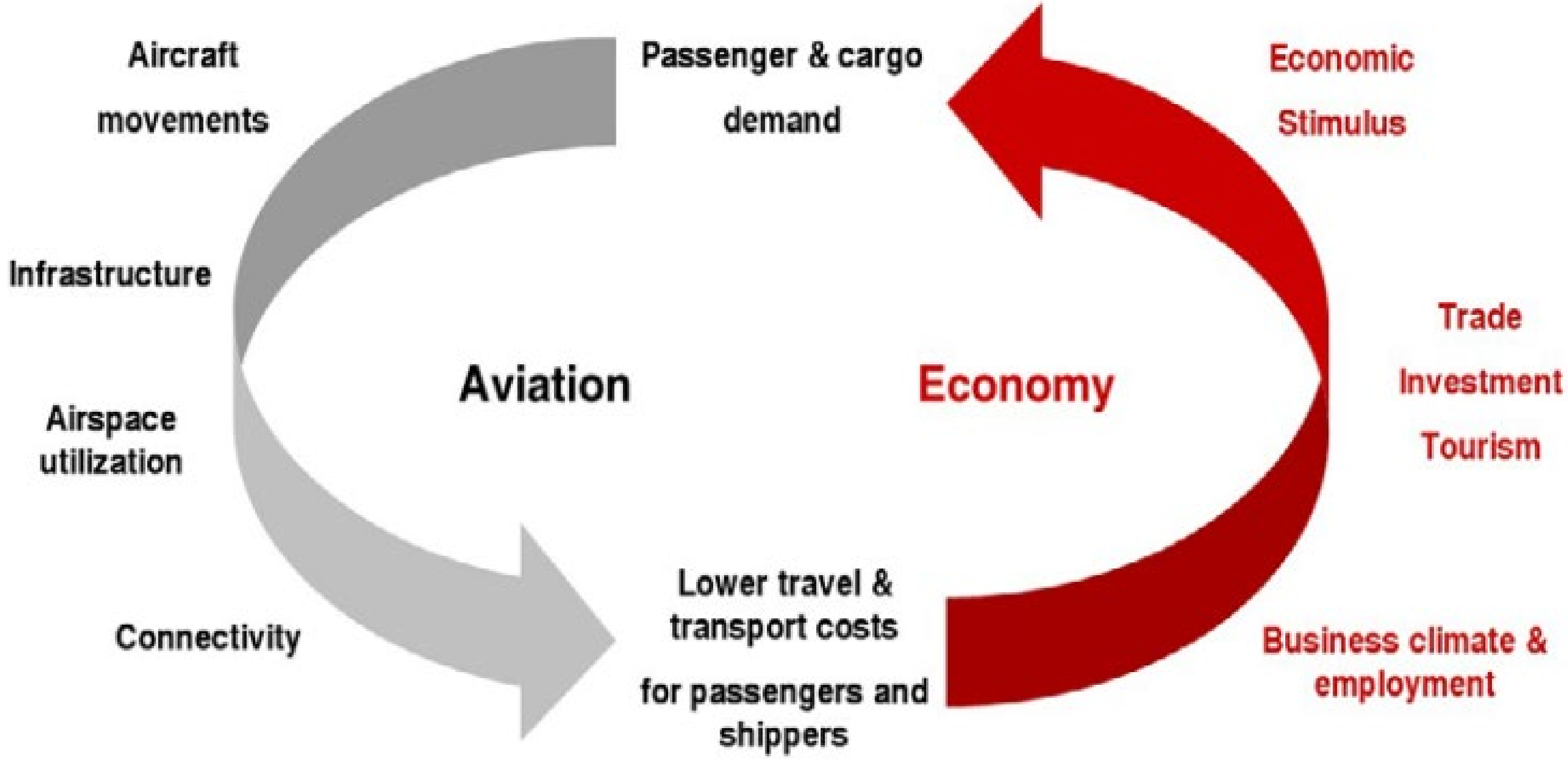
- Strengthen economic oversight
- Promote consultation
- Improve transparency
- Support demand-driven

Better outcomes are achieved through:

Early engagement	Demand validation
Transparent information sharing	Collaborative planning
Joint review of business cases	Continuous consultation

No stakeholder can build sustainable charging frameworks alone.
States, regulators, airports, ANSPs and airlines all have a role to play.

Virtuous Circle of connectivity growth and economic grown



"When charging frameworks work properly, they support this virtuous circle."

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What Success Looks Like

Airport and ANSPs	Airlines	States	Passengers
Sustainable funding	Affordable charges	Economic growth	Affordable travel
Modern infrastructure	Predictability	Better connectivity	Better service
Reasonable returns	Meaningful consultation	Investment attraction	More options
Efficient operations	Service quality	Sustainable development	Reliable networks

A successful charging framework creates value for all stakeholders.

Benefits of Efficient Charging Frameworks

- Lower fares as airlines are expected to pass on fees reductions to passengers in the long term.
- Connectivity growth (more routes, more frequencies), resulting in more flexibility for passengers and shorter travel times.
- Wider economic benefits, created by agglomeration and productivity impacts, but also additional jobs created in the economy.

Setting the Context for Discussion

- We do not need to choose between investment and affordability. We need both.
- Airlines support investment, modernization, capacity growth, sustainability and long-term development.
- Success requires transparency, consultation, cost-relatedness, accountability and effective oversight.
- Airlines are committed partners in developing infrastructure that supports connectivity, affordability and sustainable aviation growth.

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ICAO NAM/CAR/SAM WORKSHOP ON AIRPORT AND AIR NAVIGATION SERVICES USER CHARGES

Charging Landscapes of Airports and Air Navigation Services

Regional Perspective: Connectivity, Competitiveness and Airline Impacts

Mexico City | August 2026

A joint IATA – ALTA session

SESSION ROADMAP

From Principles to Practice: Today's Focus

BUILDING ON THIS WORKSHOP

- ✓ ICAO Doc 9082 charging principles & compliance
- ✓ Transparency, consultation, cost-relatedness, non-discrimination
- ✓ CAPEX oversight & economic regulation models

01

Evolution of Airport Charges

Global financial pressure, revenue mix and how charges are actually moving across regions.

02

Evolution of ANS Charges

Two speeds of ANSP charging worldwide — and a fresh regional case study.

03

Airline & Regional Perspective

Connectivity, competitiveness and what LATAM & Caribbean airlines are telling us.

REGIONAL CONTEXT

Aviation Is Latin America & the Caribbean's Connective Tissue

Vast geography, limited surface infrastructure and dispersed populations make air transport a lifeline — not a luxury — across most of the region. That is the backdrop against which every charging decision must be weighed.

US$240 bn
contribution of air transport to LAC & Caribbean GDP

385
cities across the region connected by air

3.9%
of world GDP generated by global aviation (US$4.1 tn, 87 M jobs)

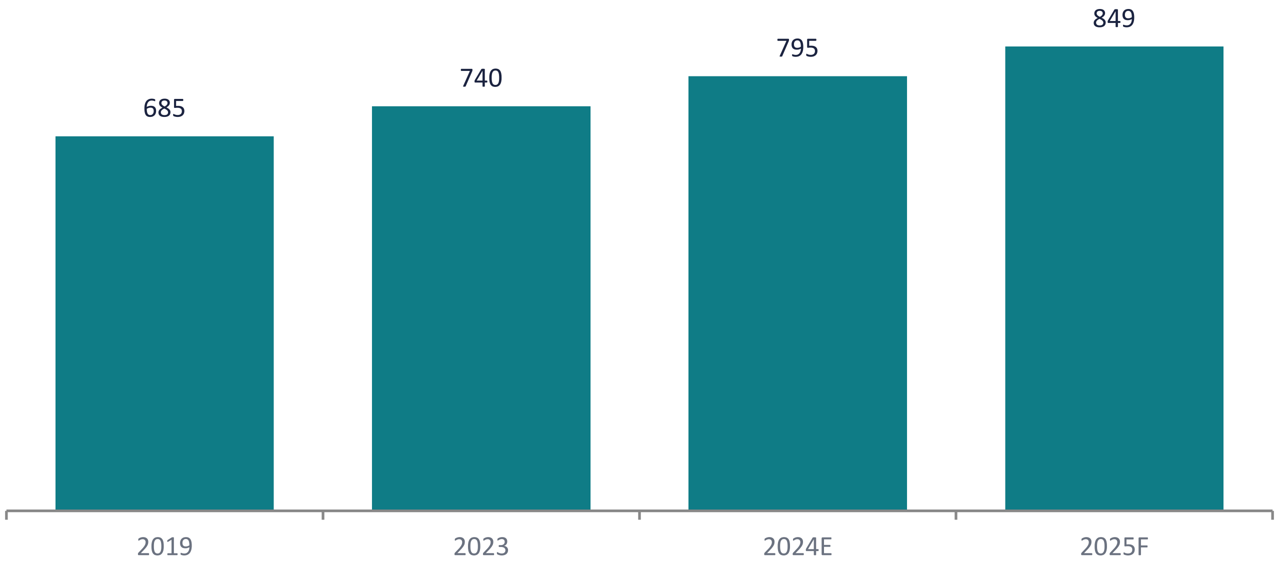
A geography where flying is often the only realistic option

- Andean, Amazonian and insular Caribbean geographies make road and rail substitution impractical for most O&D pairs.
- Aviation underpins tourism, trade and access to health, education and employment across the region.
- Charging frameworks therefore shape not just airline economics, but regional economic development itself.

Fuente: IATA, Value of Air Transport in the Americas, Dec. 2025; IATA/ATAG, Aviation Benefits Beyond Borders

The World's Fastest-Recovering Air Transport Market

Passenger traffic at LAC airports (millions)



~350 M

passengers carried per year by LAC based airlines — up 557% since 1999

~7.1%

share of global passenger traffic (5.4% of global RPKs)

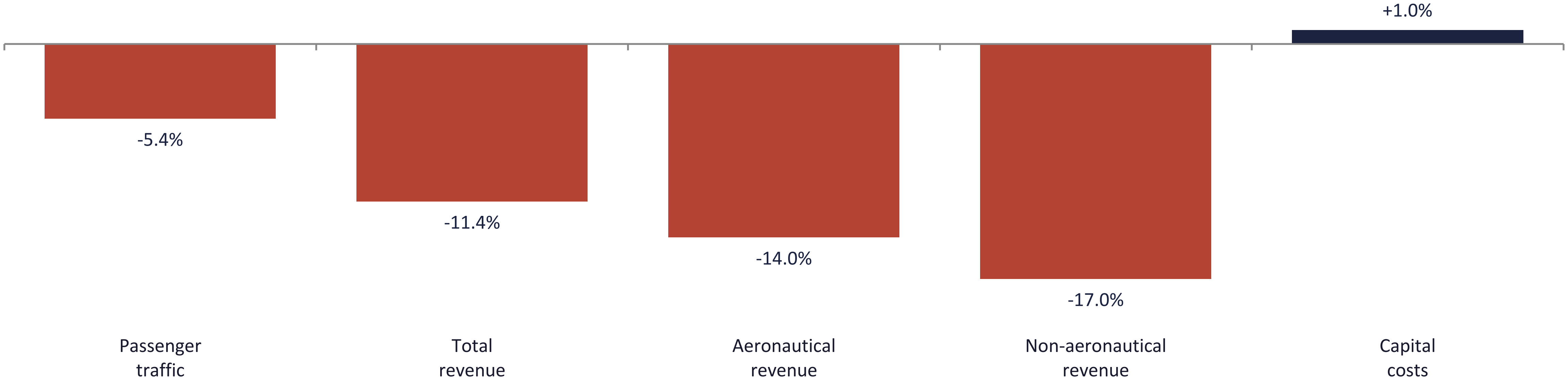
83%

regional load factor — a sign of commercial maturity

2023 traffic reached ~108% of 2019 — the fastest recovery of any world region, achieved without pandemic-era financial assistance.

Fuente: ACI World, Air Travel Demand Advisory Bulletin (LAC region); IATA, 82nd AGM, Rio de Janeiro, junio 2026, ICAO World of Air Transport Statistical Annex

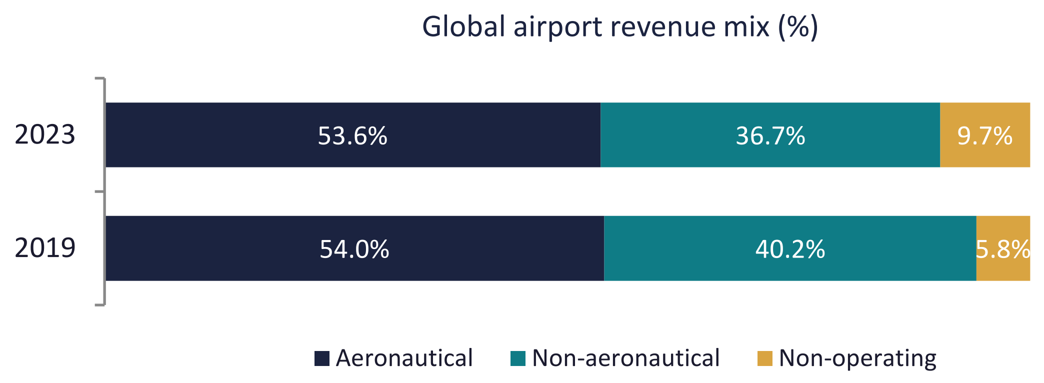
Airport Revenues Are Recovering Slower Than Costs



By 2023, global airport traffic had all but returned to pre-pandemic levels — but aeronautical revenue was still 14% below 2019, while capital costs (driven by an 18% jump in interest expense) had already overtaken it. That widening gap is a central driver of tariff reviews and CAPEX-recovery pressure across regions, including Latin America & the Caribbean.

Fuente: ACI World, Airport Economics Report & Key Performance Indicators 2025 (datos FY2023, publicado abril 2025)

Commercial Revenue Eases the Pressure on Aeronautical Charges



Aeronautical revenue's share held broadly steady (54.0% → 53.6%), while non-aeronautical revenue lost ground — underscoring why commercial diversification is a growing priority for airport financial sustainability.

US$99 bn

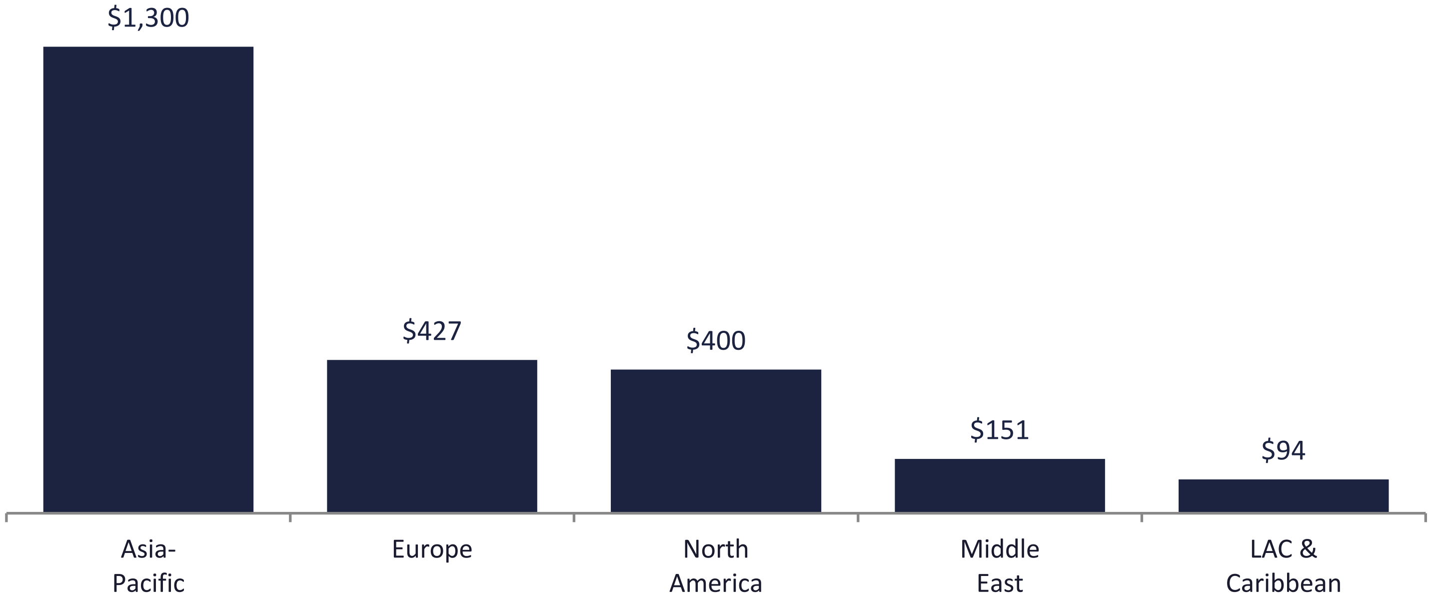
projected global non-aeronautical revenue by 2033 (38% of airport income, up from US$76 bn / 37% in 2025)

Where regulatory frameworks allow, diversifying into retail, parking, real estate and other commercial revenue reduces reliance on aeronautical charges — directly supporting the strategic message that commercial revenues should help ease the burden on airlines and passengers.

Fuente: ACI World, Airport Economics Report & KPIs 2025; ACI World forecast cited in Moodie Davitt Report, febrero 2026

INFRASTRUCTURE INVESTMENT

US$2.4 Trillion Needed Globally for Airport Infrastructure to 2040



US$94 bn

LAC & Caribbean airport CAPEX needs to 2040 — of which ~US$41 bn in new greenfield airports

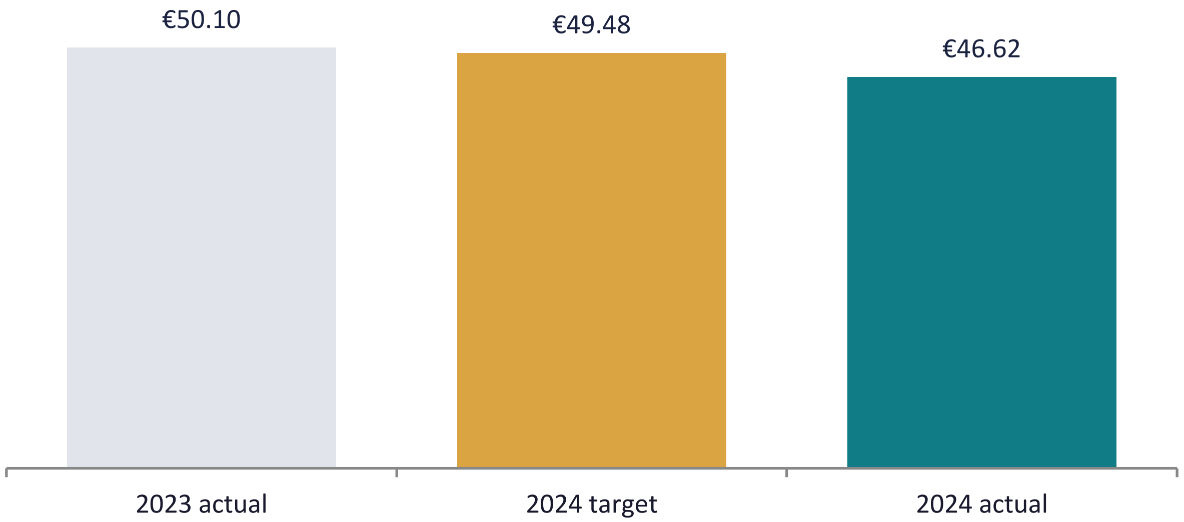
A smaller slice of the global total, but decisive for a region where capacity constraints directly limit route development and connectivity growth.

LAC & the Caribbean represents under 4% of the global CAPEX total — but airport capacity is already a binding constraint on route development in several of the region's largest and fastest-growing markets.

Fuente: ACI World, Global Outlook of Airport Capital Expenditure (con Oxford Economics), estimaciones 2021–2040

ANSP Charging Is Moving at Two Different Speeds

A MATURE MARKET, UNDER TARGET



European ANSPs cut actual unit costs 7% year-on-year in 2024, landing below the EU efficiency target — a benchmark of what sustained cost discipline can look like.

A CAUTIONARY REGIONAL CASE

Argentina, 2026

In a single set of resolutions, en-route ANS charges rose up to 359% for domestic operations, applied with no prior consultation process. Full case on the next slide.

+359%

increase in domestic ANS unit charges (Resolución ANAC 265/2026)

Fuente: CANSO / EU Performance Review Body, Annual Monitoring Report, octubre 2025; ANAC (Argentina), Resolución 265/2026

REGIONAL CASE STUDY

Argentina 2026: When Charges Rise Without Consultation

In May 2026, Argentina's civil aviation authority (ANAC) enacted two resolutions raising airport security and air navigation charges — with no prior consultation process.

RESOLUCIÓN ANAC 258/2026

Airport security fee

+325×

domestic (cabotage) fee: from ARS 20 to ARS 6,500 per passenger. Regional +13.5%, international +12.5%.

RESOLUCIÓN ANAC 265/2026

EANA en-route ANS charges

+359%

domestic operations; +15% for international operations. Replaces the tariff schedule in force since 2024.

IATA formally requested an immediate suspension (1 May 2026); ALTA joined the request days later, warning that the increases put at risk the competitiveness gains the sector had achieved. Both cited the absence of the promised prior consultation.

Context: the increases landed amid record activity — 3.9 M passengers Jan–Apr 2026, the country's best-ever start to a year.

Fuente: ANAC (Argentina), Resoluciones 258/2026 y 265/2026; Aviacionline, Infobae, mayo 2026

THE CAUSAL CHAIN

How Charging Decisions Ripple Into Economic Development

Airport + ANS Charges → Route Economics → Capacity & Network Decisions → Connectivity → Economic Development

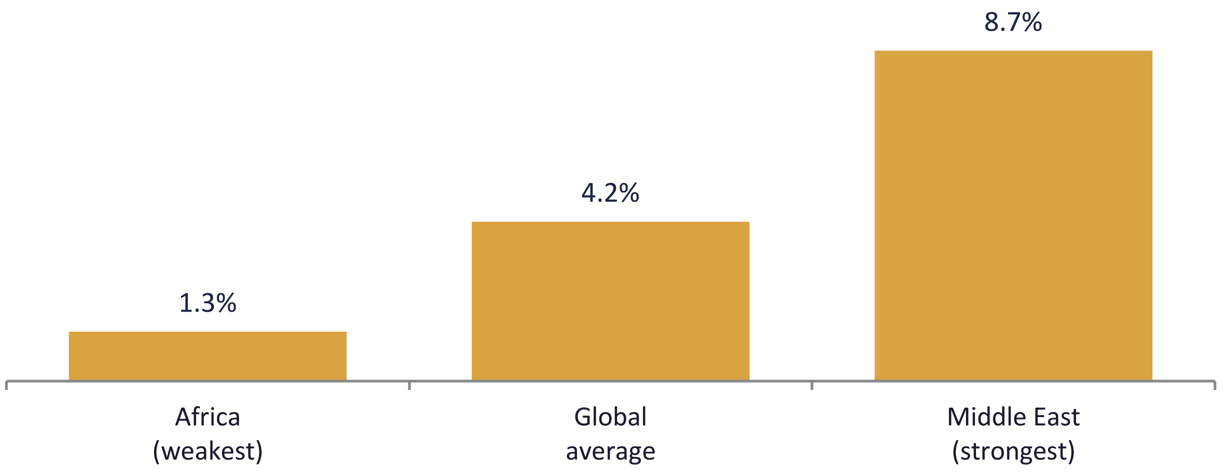
What this means in practice

Every peso, dollar or euro added to airport and ANS charges feeds directly into route-level economics. Where margins are thin — as in much of Latin America & the Caribbean — that pressure shows up first as deferred frequencies, delayed new routes and higher fares, and only later as the connectivity and GDP losses regulators actually want to avoid.

Fuente: Elaboración propia, con base en el marco conceptual IATA / ICAO / ACI sobre cargos y conectividad

Thinner Margins, Higher Cost Exposure

2025 airline net profit margin, selected regions



Latin America was the one region where 2025 net profit was expected to fall — to about US$1.1 bn, down from US$1.3 bn in 2024 — even as most other regions improved on the year before.

2026 OUTLOOK, TRIMMED

2.0%

global net margin forecast for 2026 — halved from 3.9% projected only months earlier, after Middle East disruption and a 70% YoY jump in jet fuel (+US$100 bn industry-wide)

LAC's structural fragility

IATA notes the region's airlines typically carry limited balance-sheet flexibility and higher funding costs, with an EBIT-to-net-margin ratio around 4× the global average — leaving little room to absorb rising charges.

Fuente: IATA, 82nd AGM (Río de Janeiro, junio 2026); IATA, 81st AGM (Nueva Delhi, junio 2025)

AIRLINE PERSPECTIVE

Recurring Concerns From the Region's Airlines

Brazil: ANS charges under scrutiny

Air traffic control charges are described by IATA's regional leadership as the highest in the region; a proposed 26.5% VAT on tickets (2028) could cut demand by up to 30%.

Colombia: a structural asymmetry

The regulated international passenger charge (~US$51) is more than 10× the domestic charge (under US$4) at the same airports.

Argentina: taxes & charges pile up

Airport taxes, fees and charges are estimated to represent roughly 55% of the ticket value on some domestic routes.

A region-wide cost storm

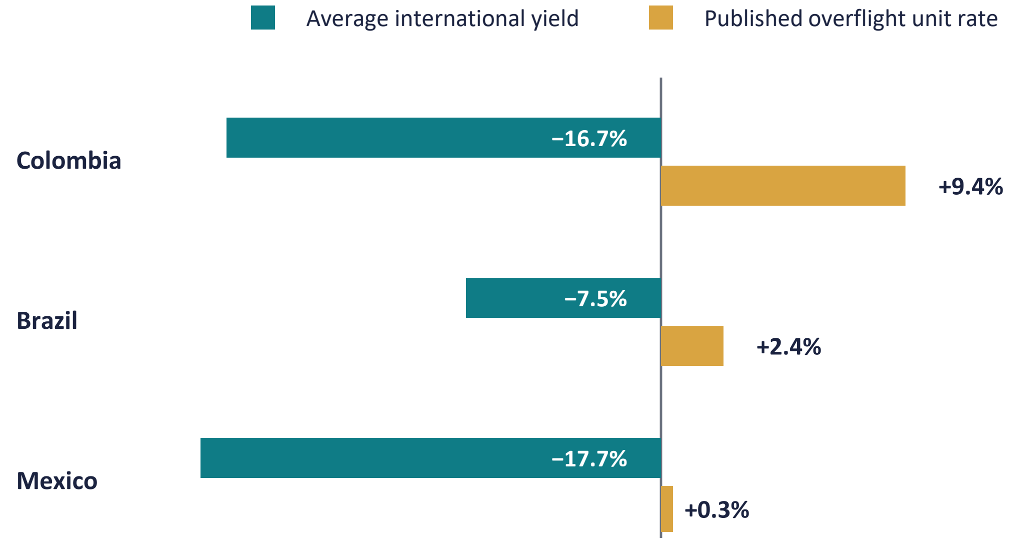
An ongoing engine and MRO supply crisis is grounding aircraft and pushing up lease and maintenance costs across nearly every LATAM carrier, compounding charging pressure.

Fuente: IATA, Airlines Magazine, mayo 2026; El Cronista, nov. 2025; Infobae, mayo 2026 (ALTA AGM Leaders Forum, Lima, 2025)

AIRLINE PERSPECTIVE

International airline yields and published overflight unit rates followed different paths between 2019 and 2025

2019–2025 REAL CHANGE, CONSTANT 2025 USD



3 markets represent approximately 60% of the region's traffic market

Descriptive comparison from the airline-user perspective; it does not assess cost-relatedness, adequacy or relative efficiency.

WHAT THE COMPARISON SHOWS

Different real price trajectories from the airline-user perspective.

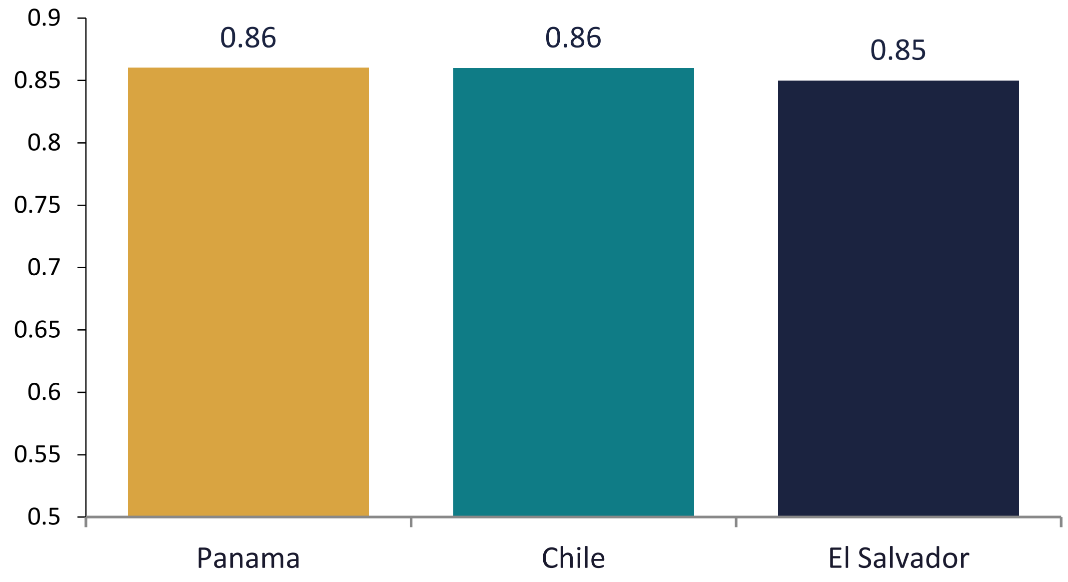
WHAT IT DOES NOT SHOW

Whether individual charges are cost-related, adequate or efficient.

Source: ALTA calculations based on Cirium; Aerocivil, ANAC and Mexican authorities; U.S. BLS; IRS yearly average exchange rates. 2019–2025 endpoints. Values in constant 2025 USD. BRL- and MXN-denominated rates converted using yearly average exchange rates. Comparison measures changes over time, not absolute price levels or relative efficiency.

REGIONAL COMPETITIVENESS

Panama, Chile and Brazil Lead Regional Competitiveness



Top 3 of 20 countries assessed, 2025 edition

THREE PILLARS ASSESSED

- Operating costs
- Infrastructure quality
- Taxes & passenger charges

Even the region's leaders show room for improvement: Panama and Chile both score below regional potential on operating costs, and Brazil trails on air transport infrastructure investment.

REGIONAL COMPETITIVENESS

Market Size Does Not Guarantee Competitive Charges

0.95

Brazil — best international connectivity score in the region (Before tax reform)

16 / 20

Mexico's rank on the taxes & passenger charges pillar (score 0.55) — despite leading on connectivity

Colombia, Mexico and especially Brazil — three of the region's largest markets — score well below Panama, Chile and Ecuador on infrastructure quality.

Fuente: ALTA – Air Transport Competitiveness Index, , 2025

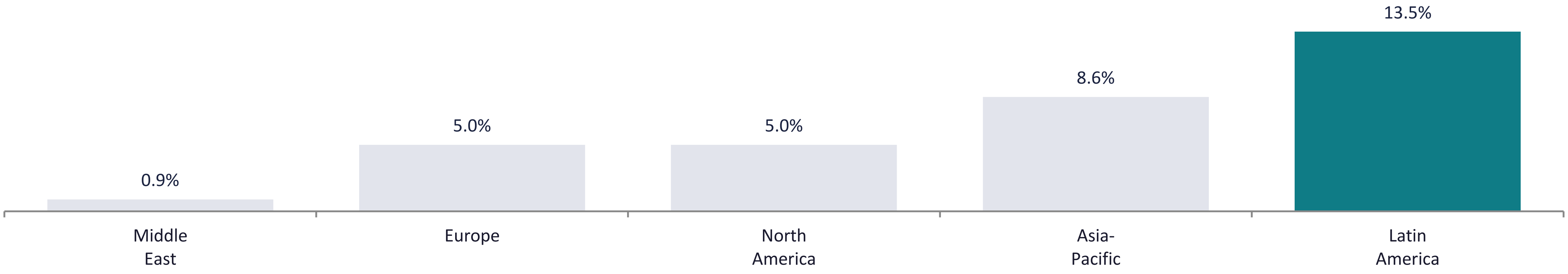
A Region Reconnecting Faster Than the Rest of the World

+9%
growth in IATA's global Air Connectivity Index, YoY (2025)

+13.5%
LAC passenger demand growth, Feb. 2026 — fastest of any region that month

+5%
LAC demand growth forecast for full-year 2026, vs. 2.1% global

Passenger demand growth by region — February 2026, year-on-year



Fuente: IATA, Air Passenger Market Analysis, feb. y jun. 2026; IATA, Value of Air Transport in the Americas, dic. 2025

COMMON MESSAGES

What This Means for the Region

Charges should support connectivity, not become a barrier to growth.

Infrastructure investment is necessary, but it must be efficient, justified and subject to meaningful consultation.

Compliance with ICAO Doc 9082 principles remains uneven across the region.

Transparency and economic oversight are essential to achieve cost-efficient service provision.

Charges should be linked to service quality, performance and user benefits.

Commercial revenues should help reduce the burden on users, where consistent with the regulatory framework.

Fuente: Elaboración propia, con base en las conclusiones del workshop, ICAO / IATA / ALTA, 2026

CLOSING THE LOOP

Sustainable Charging Frameworks Power a Virtuous Circle

Efficient, transparent charges

Sustainable investment capacity

Investor & airline confidence

Charges as an enabler, not a barrier

Traffic & revenue growth

Connectivity & route growth

Tourism, trade, jobs, GDP

Fuente: Elaboración propia

Thank You

Charging Landscapes of Airports and Air Navigation Services — Regional Perspective

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