



**INTERNATIONAL
CIVIL AVIATION
ORGANIZATION**



Fourteenth Meeting of the North American, Central American and
Caribbean
Directors of Civil Aviation (NACC/DCA/14)
St. George's, Antigua and Barbuda, 1 to 5 June 2026

Air Transport Developments in the Region
P/07
Agenda Item: 08

Presented by the Secretariat

Air Transport Developments in the Region

Air Transport status in the North American, Central American and Caribbean (NACC) Region

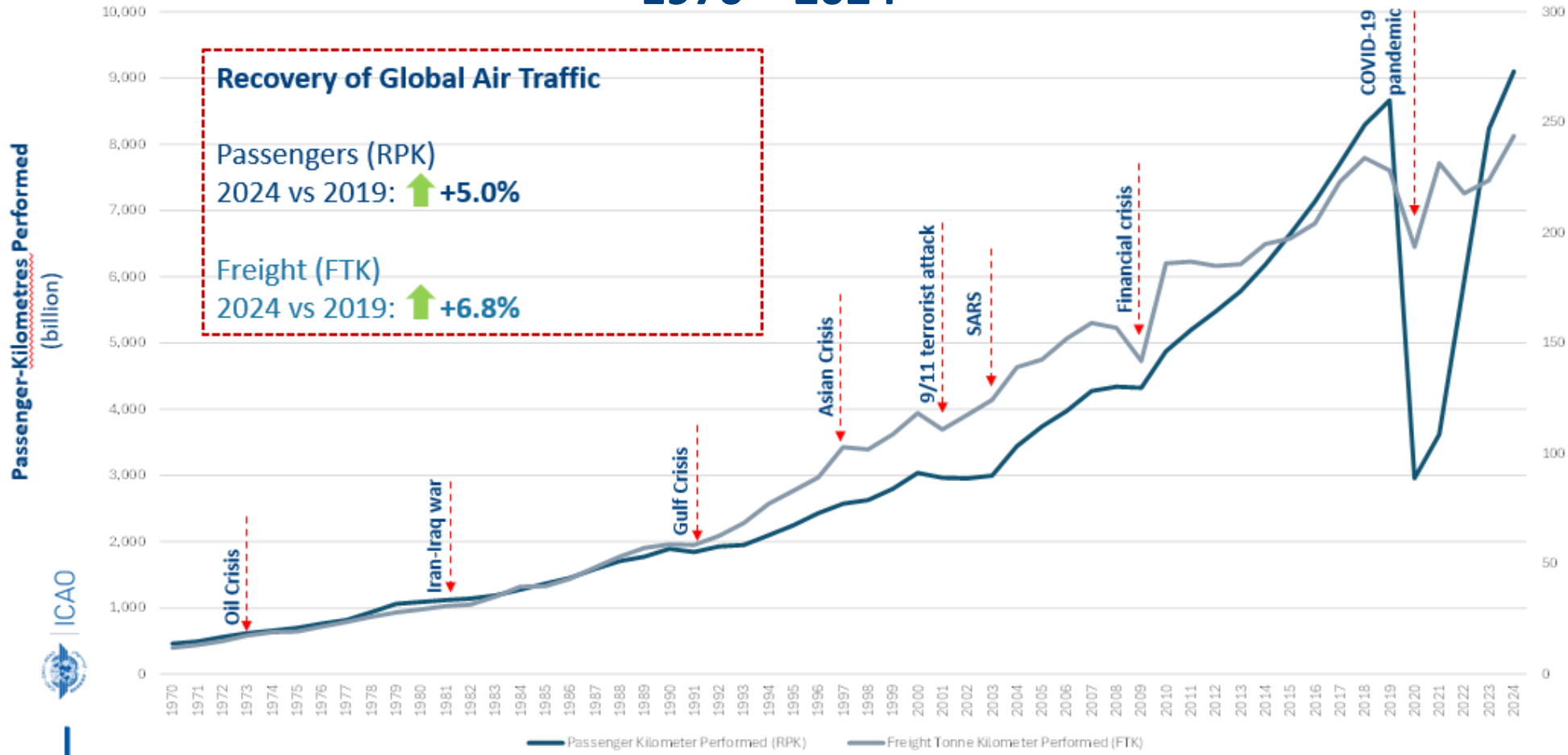
2026 Air Transport Expectations for the NACC Region

ICAO's guidance related to air transport policy, regulation and infrastructure management.

ICAO NACC Air Transport activities

Air Transport status in the North American, Central American and Caribbean (NACC) Region

Global Traffic Evolution 1970 – 2024

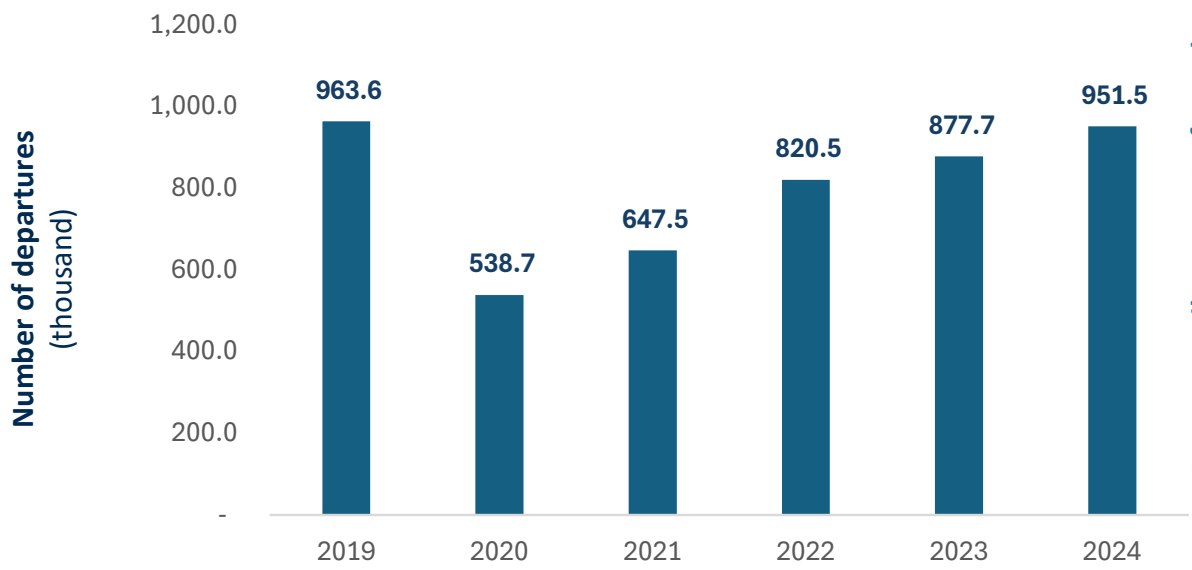


Source: ICAO Annual Report of the Council

Traffic Performed in Central American and Caribbean Region, 2019-2024

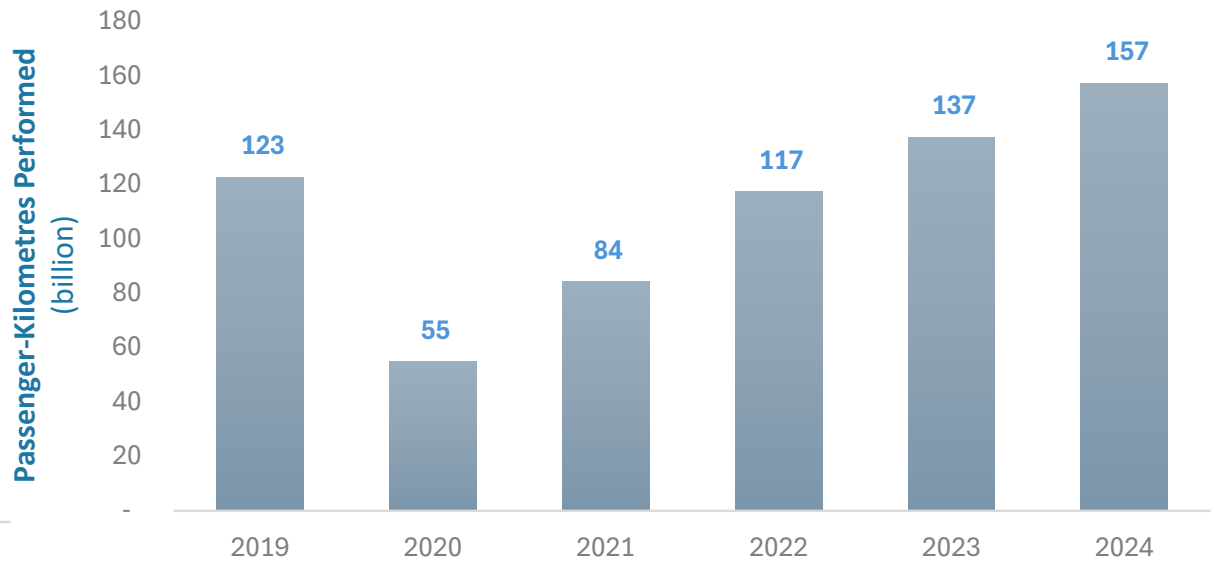
Departures

2024 vs 2019: -1.3%
2024 vs 2023: + 8.4%



Revenue Passenger Kilometer Performed (RPK)

2024 vs 2019: + 27.6%
2024 vs 2023: + 14.5%



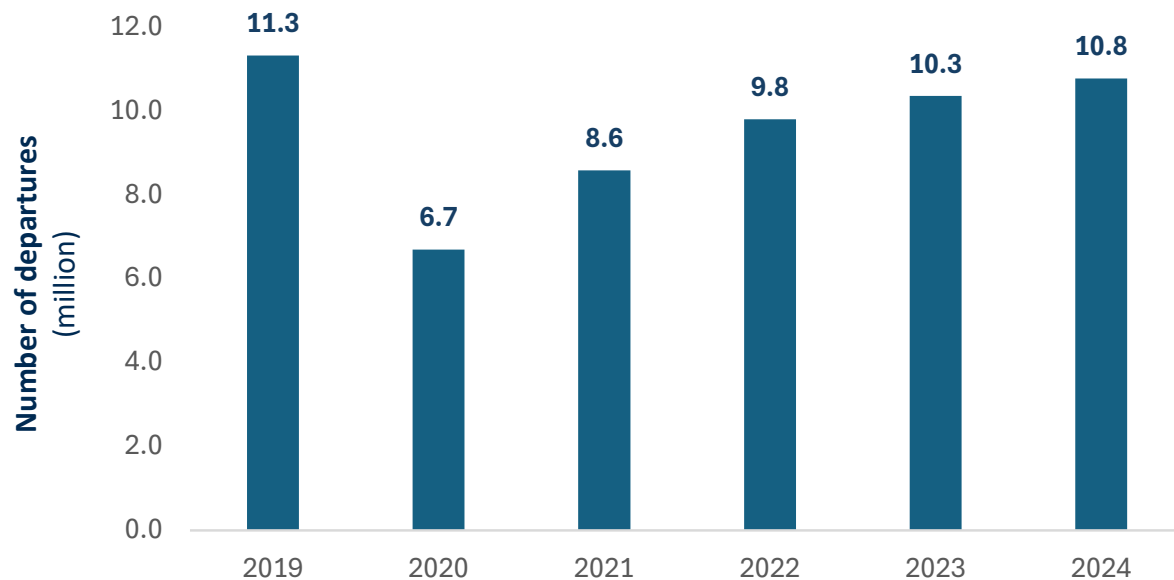
Passenger traffic continues to recover steadily across the region

Traffic Performed in North American Region, 2019-2024

Departures

2024 vs 2019: ↓ - 4.4%

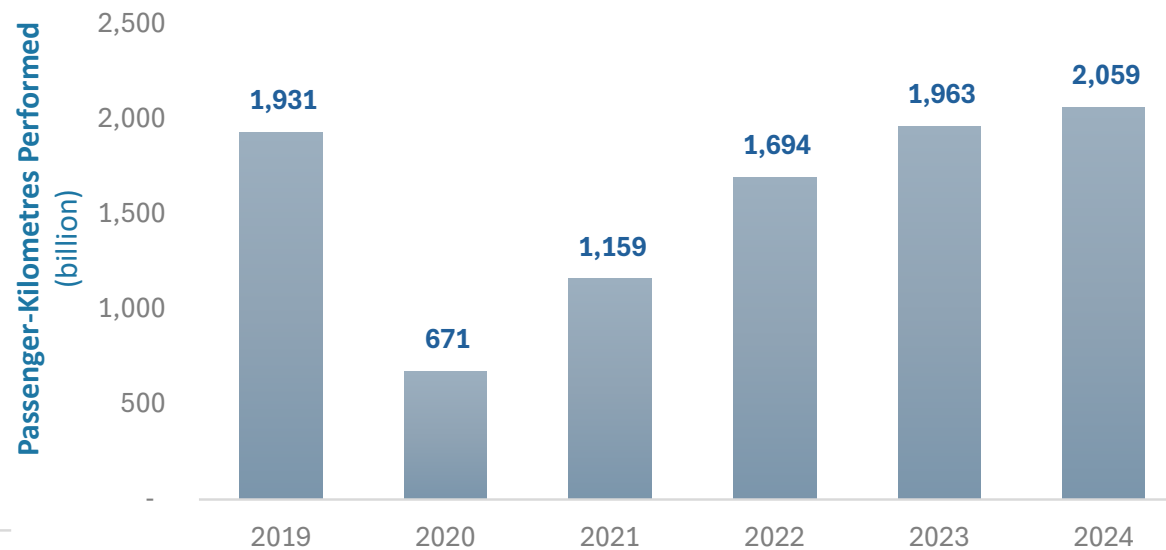
2024 vs 2023: ↑ + 4.8%



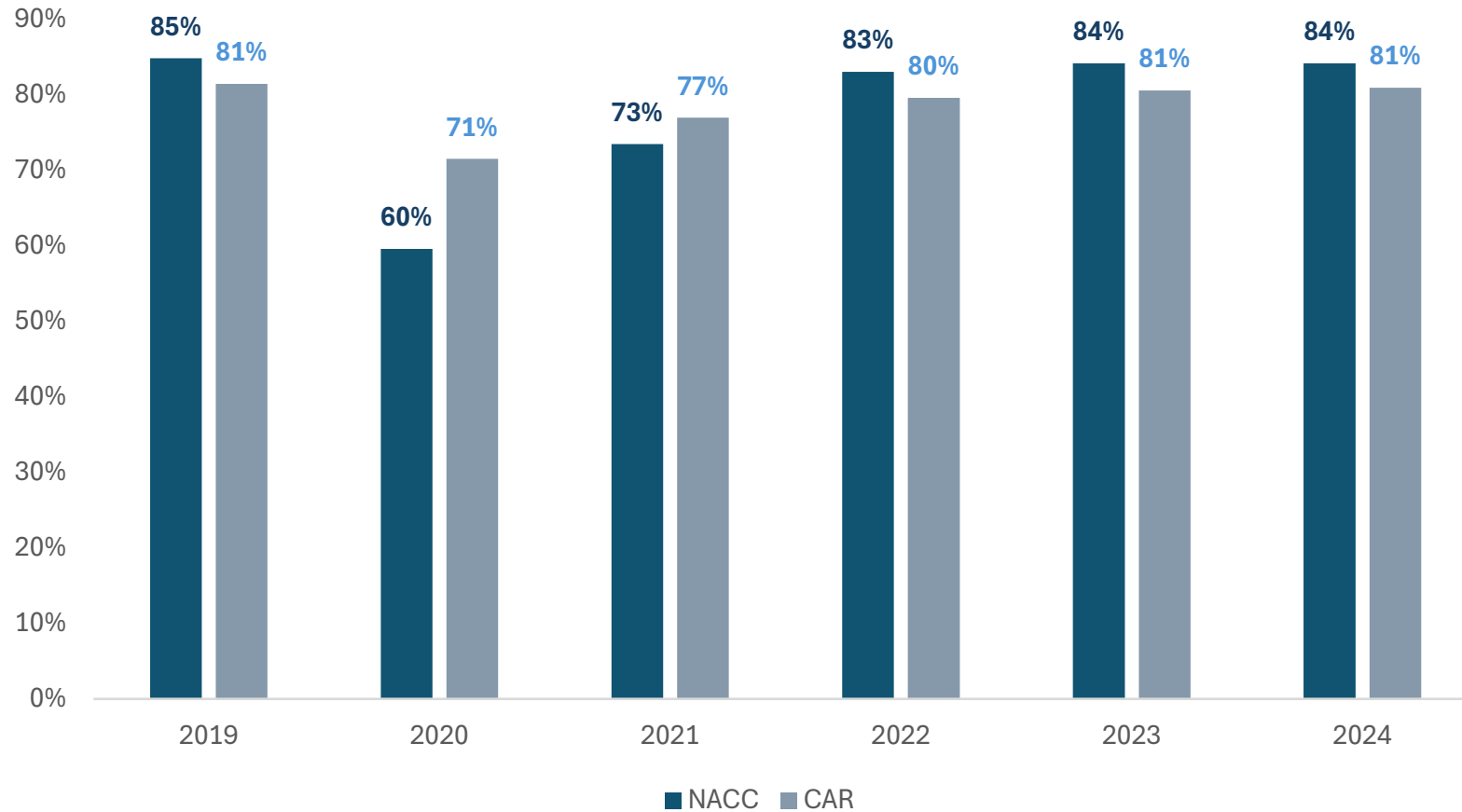
Revenue Passenger Kilometer Performed (RPK)

2024 vs 2019: ↑ + 6.6%

2024 vs 2023: ↑ + 4.8%



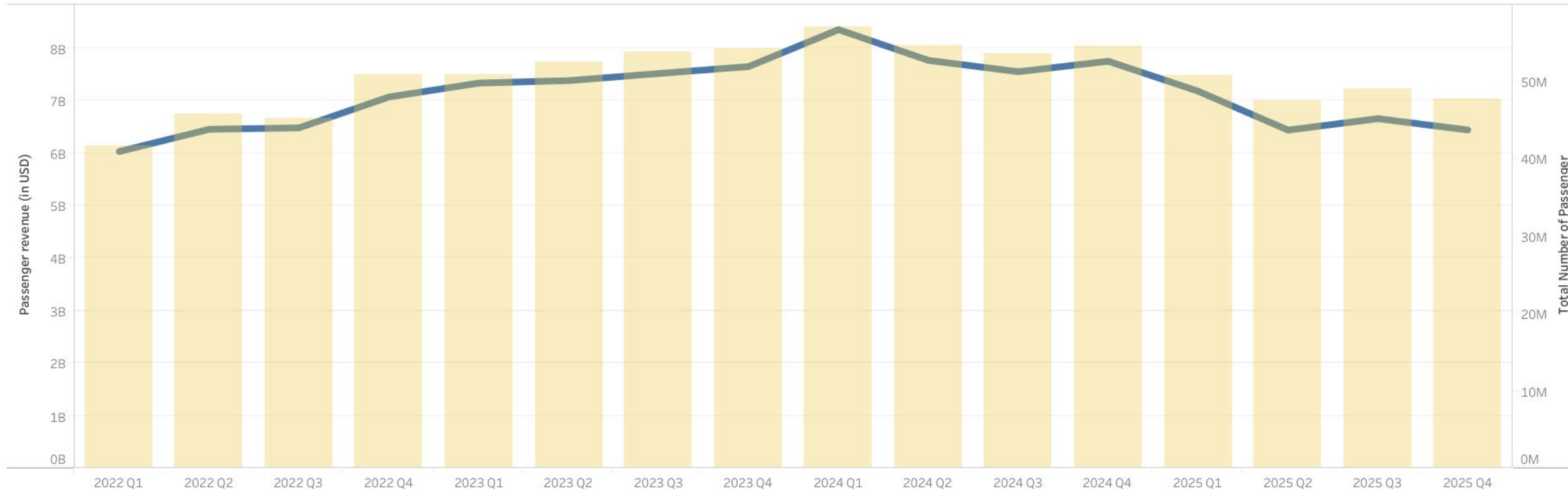
Passenger Load Factor (PLF) evolution in the NAM/CAR Region, 2019-2024



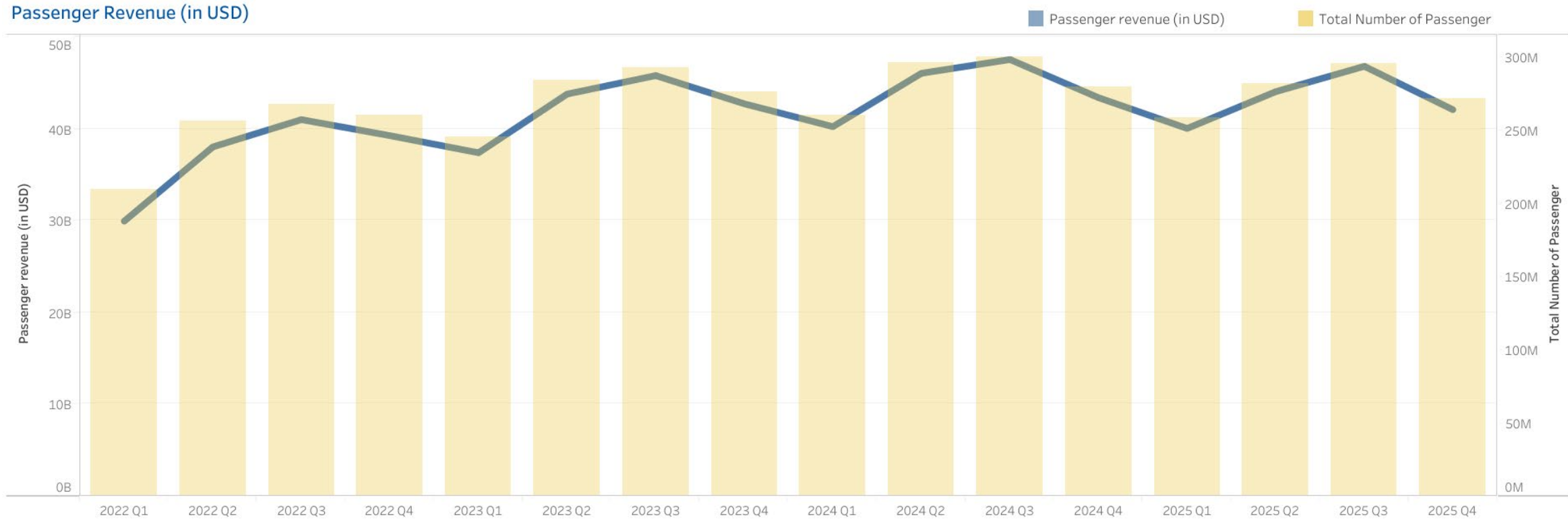
Passenger Revenue Trends by Central America and the Caribbean

Passenger Revenue (in USD)

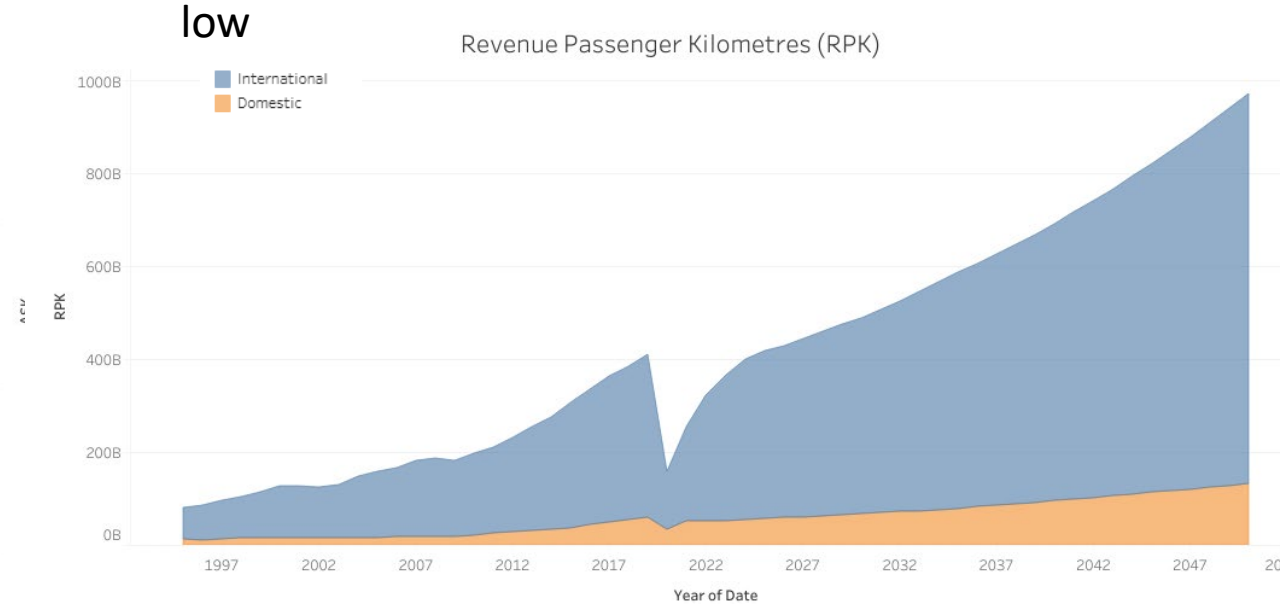
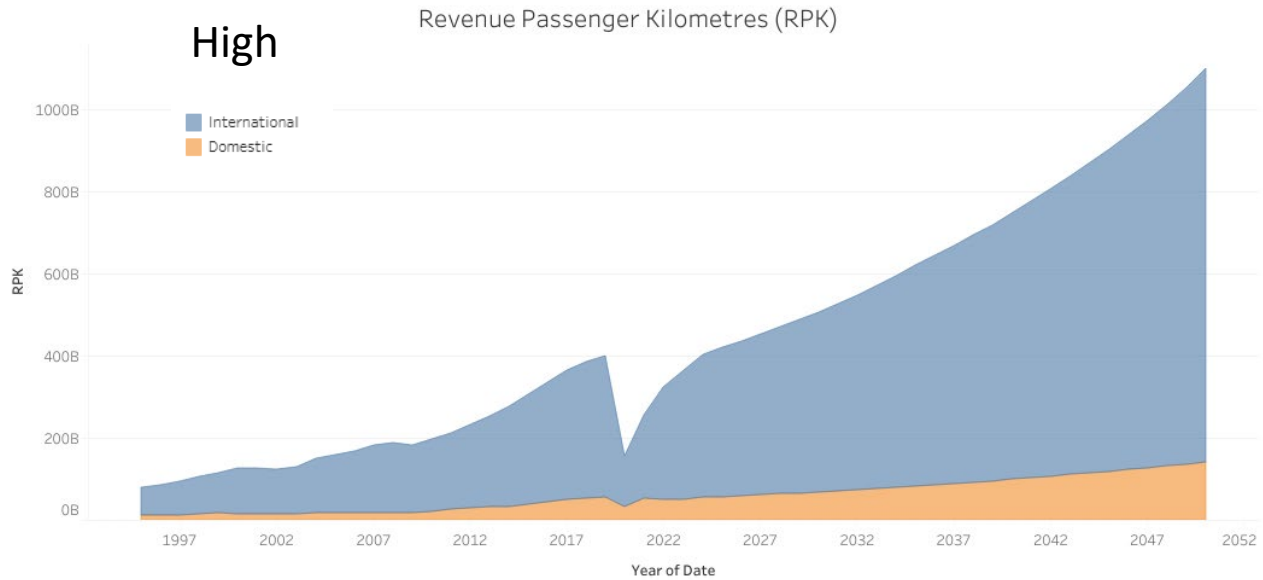
Passenger revenue (in USD) Total Number of Passenger



Passenger Revenue Trends by North American Region



CAR long term traffic forecasts (Revenue passenger-kilometres (RPK), Passenger)



*CAGR: Compound annual growth rate

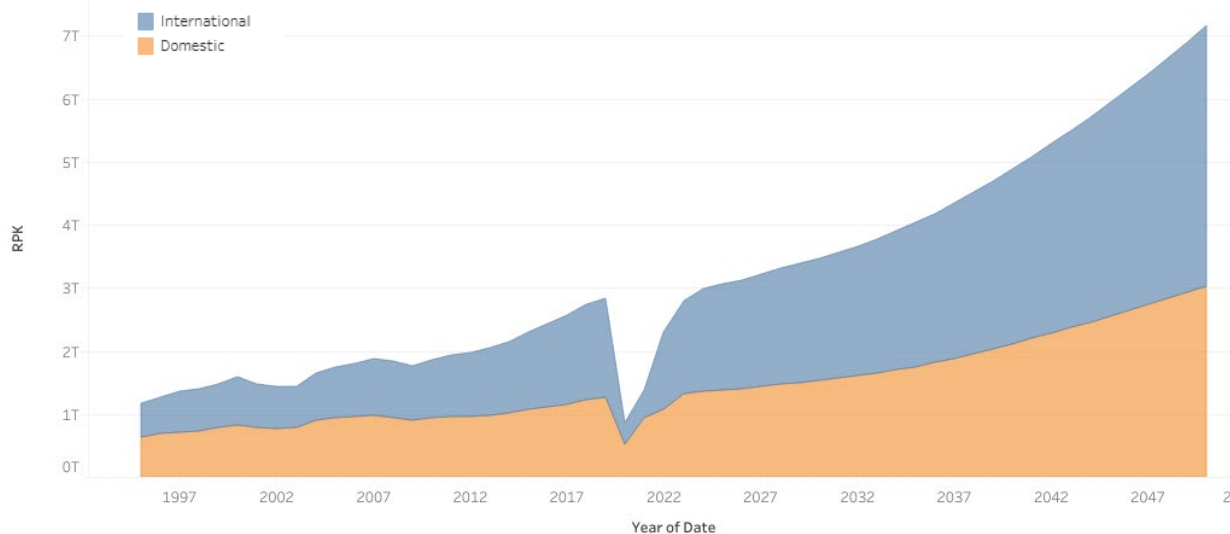
Traffic is expected to continue expanding under both baseline and high-growth scenarios

Source: ICAO Big Data dashboards and analysis

NACC long term traffic forecasts (RPK, Passenger)

High

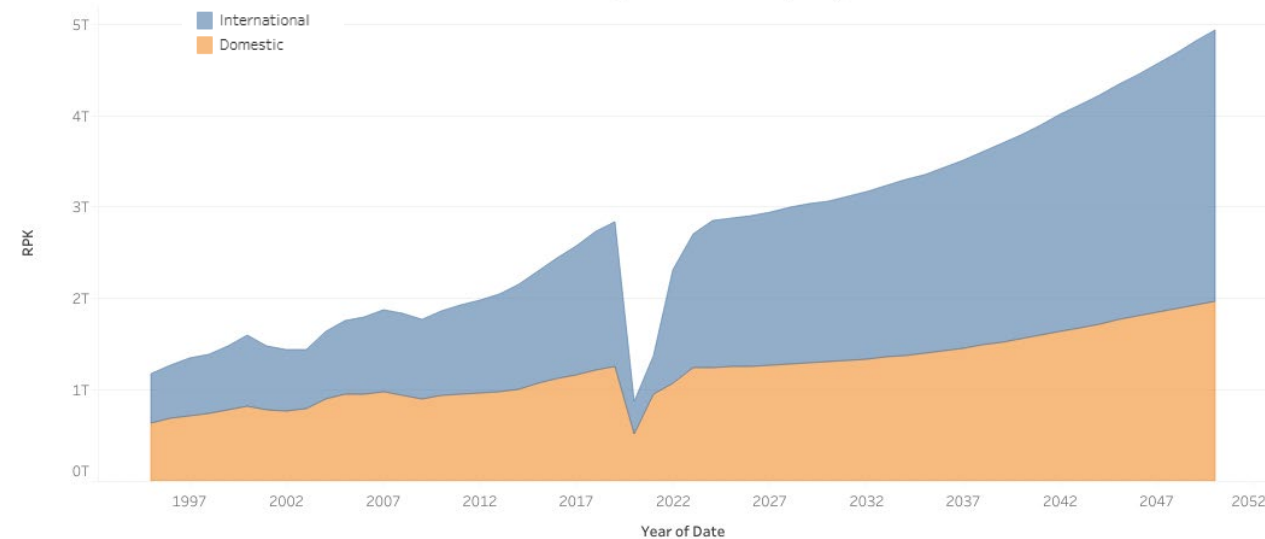
Revenue Passenger Kilometres (RPK)



*CAGR: Compound annual growth rate

Low

Revenue Passenger Kilometres (RPK)



Long-term forecasts indicate sustained growth in passenger demand across NACC region.

Source: ICAO Big Data dashboards and analysis



ICAO

Reporting of Air Transport Reporting Forms (ATRs)

- Percentage of reported data in terms of Revenue Tonne Kilometres(RTK) for 2024: 99%
- Percentage of estimated data in terms of RTK: **1%**
- Number of Member States that have reported their ATRs as of May 2025: **14**



Acknowledge and welcome to reporting

- Bermuda
- Turks and Caicos Islands



The region, in general terms, continues to report in a timely manner and with high standard of data.

Areas for further enhancement:



- Further increasing the number of States participating in ATR reporting.
- A number of States have yet to designate a focal point for coordination with ICAO Statistics Programme.



Member States of the NACC Region are encouraged to further strengthen their engagement and active participation in the upcoming ADAP Panel, September 2026.

2026 Air Transport Expectations for the NAM/CAR Regions

Support the effective application of ICAO Economic Policies

Promote and support State preparedness for the 7th Air Transport Conference (AT/Conf/7)

Promote Air Transport Connectivity and Liberalization in the Caribbean and Central America

Strengthen Air Transport Data and forecasting

ICAO's Long-term Vision for International Air Transport Liberalization

Air Transport Policy and Regulation

Ensuring that international air transport services may be developed in an orderly, regular, efficient, economical, harmonious and sustainable manner

ICAO SUPPORT TO MEMBER STATES

Policy guidance material

Dialogues and exchange of information

Training

Events

Databases

Worldwide Air Transport Conference

ICAN

World Air Services Agreements (WASA)

Compendium: Competition

Compendium: Consumer protection



Doc 9587



Doc 9626



Doc 8632

- Air Transport Economics (ATE EN): Online
Developed by International Civil Aviation Organization, Canada
English 6 Hours Online
- Air Transport Economics for Airport Professionals (ATEAP EN): Online
Developed by International Civil Aviation Organization, Canada
English 7 Hours Online
- Air Transport Regulation (ATR EN): Online
Developed by International Civil Aviation Organization, Canada
English 8 Hours Online
- Air Transport Regulations Issues (ATRI EN): Online
Developed by International Civil Aviation Organization, Canada
English 6 Hours Online
- Introduction to Air Cargo Economics (IACE EN): Online
Developed by International Civil Aviation Organization, Canada
English 2 Hours Online

Air Transport Regulation Panel (ATRP)



Article 15 of the
Chicago Convention



Market Access



ICAO Template Air
Services
Agreements



Economic
Guidance on
International
Operations of
Unmanned
Aircraft Systems
(UAS)



Organization of
the Seventh
Worldwide Air
Transport
Conference
(ATConf/7)

Aviation Infrastructure Management

Promoting the efficient development of aviation infrastructure



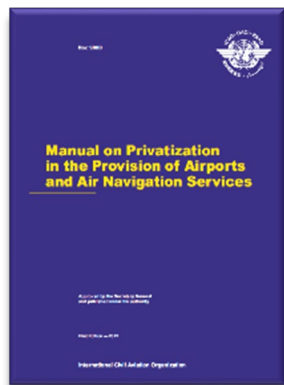
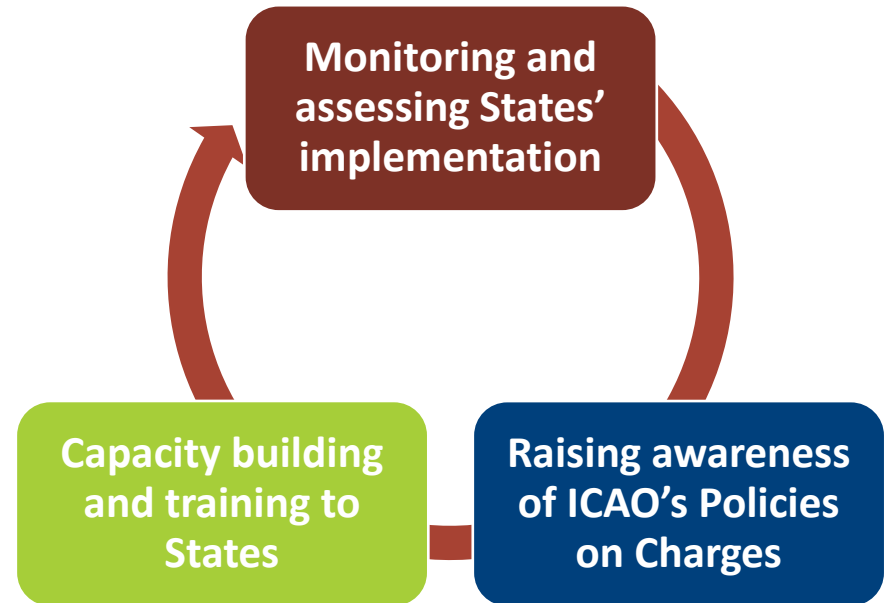
ICAO's policies and guidance on infrastructure management and implementation support



Doc 9082

Doc 9562

Doc 9161



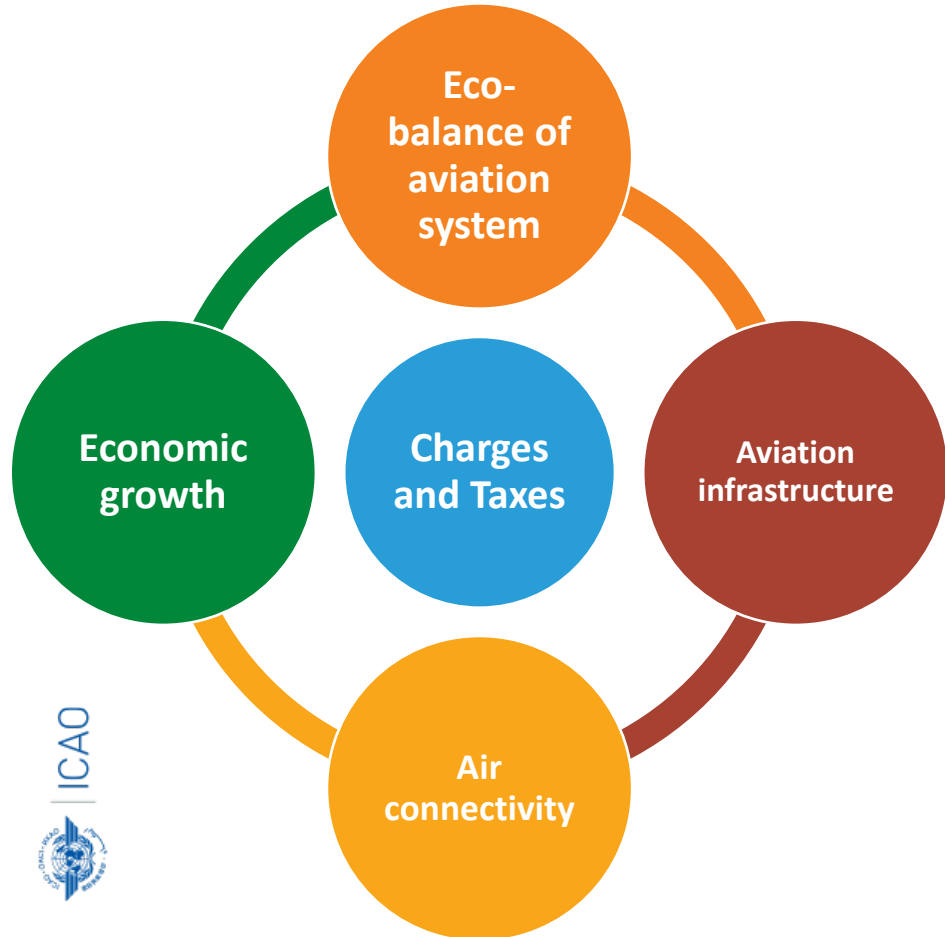
Doc 9980



Doc 10170

- **Doc 9082** – ICAO's Policies on Charges for Airports and Air Navigation Services
- **Doc 9562** – Airport Economics Manual
- **Doc 9161** – Manual on Air Navigation Services Economics
- **Doc 9980** – Manual on Privatization in the Provision of Airports and Air Navigation Services
- **Doc 10170** – Manual on Economic and Financial Analyses for Aviation Infrastructure Projects

Impact of charges and taxes on air transport development



Charges

Implementation of ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082)

Key charging principles: Non-discrimination, cost-relatedness, transparency and consultation with users

Balance between the interests of airports, ANSPs, airlines and passengers

Taxes

Implementation of ICAO's Policies on Taxation on International Air Transport (Doc 8632)

Consider the implication of taxes on the industry's contributions to national economy

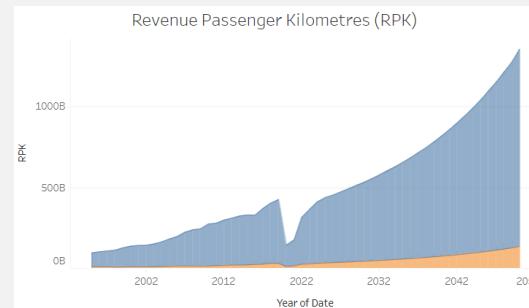
The work on Aviation Data and Analysis

Official aviation statistics with big data sources



A high-quality analytical foundation and enabling granular, timely insights into global aviation activity.

Long-term traffic forecast



A strategic tool for long-term planning, capacity building, and investment prioritization.

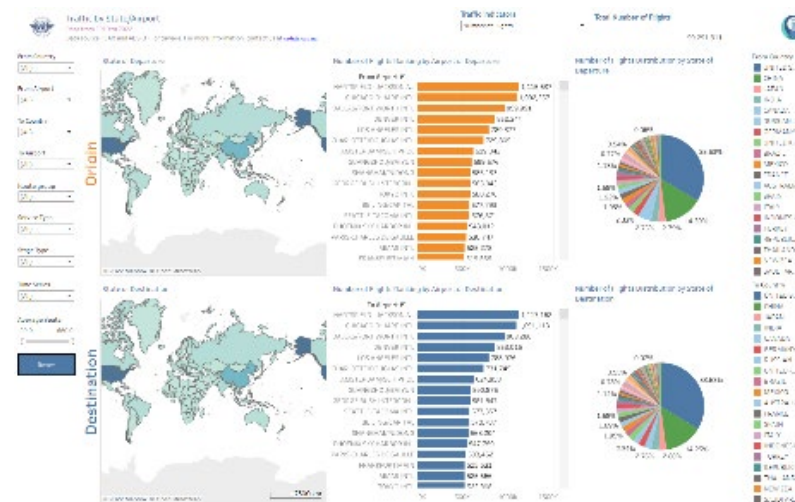
Analysis of aviation personnel by gender



To raise awareness of the still significant aviation gender gap, which will lead to better policy making.

ICAO Traffic and Economic Dashboards

- ✈ Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**.
- ✈ Covering a **wide array of analytics**:
 - Operations;
 - Fleet usage;
 - Long-term forecast;
 - Flight Information Region (FIR) traffic;
 - Revenue impact on airlines, airports and Air navigation services providers (ANSPs) at different levels of granularity.
- ✈ Each Member State has been provided with a free license. For further information, please contact ada2@icao.int.



The Worldwide Air Transport Conference (ATConf)

Background

Global forum for policy and decision making that determines measures to improve economic regulatory environment

Six such Conferences were organized in the past.
Latest: ATConf/6 - held in 2013

ATConf

Since ATConf/6, many significant changes have taken place within the international air transport industry

States and ICAO have an important role in creating a conducive economic environment

ATConf/7

Date

• 16 to 20 November 2026

Venue

• Montreal, Canada



Coordination for States response on ATCONF/7 Concept Note- 80% response from NACC States

ATCONF/7 Preparatory Webinar- 20 May 2026: ICAO-LACAC

Promotion and support to States for focused participation

Coordination with International Organizations

ICAO NACC Air Transport activities

Ensuring that international air transport services may be developed in an orderly, regular, efficient, economical, harmonious and sustainable manner

ICAO'S SUPPORT TO MEMBER STATES

Policy guidance materials

Dialogues and exchange of information

Trainings

Events

Databases

Worldwide Air Transport Conference

ICAN

WASA

Compendium:
Competition

Compendium:
Consumer protection

Survey on Barriers to Market Access and Foreign Investment in Airlines (2025)

Workshop on Negotiation and Economic Regulation of International Air Transport (Lima, Perú, 16 and 17 October 2025)

State coordination and support for ICAN 2025 participation

ICAN 2025

Nomination of State focal point to enable access to the Aero Tariffs platform

Creation of NACC Air Transport focal point for implementation support

NAM/CAR/SAM Workshop on Airport and Air Navigation User Charges
ICAO NACC Regional Office, Mexico City, Mexico, 10-12 August 2026

NACC Strategic Assistance Programme (SAP)

4

- ✓ Maintain the initiative in response to the ICAO “NO COUNTRY LEFT BEHIND” Campaign;
- ✓ Establish a **Political Commitment** through the establishment of the **Country Strategic Plan of Action (COSPA)** or other means of commitment with NACC ICAO;
- ✓ Assists States in implementing **ICAO SARPs**, also to resolve Significant Concerns (**SSCs and SSeCs**).
- ✓ Cover **all areas of international civil aviation**;
- ✓ **Coordination, collaboration and synergy** of effort between all partners.
- ✓ Shift to a **strategic approach** in State assistance that still incorporates a **systemic evaluation of needs and feasibility**.



Foster Air Transport initiatives to enhance air liberalization implementation and the enhancement of air transport connectivity among CAR States

- Antilles-Guyana Basin Air Transport Conference (October 2025)
- eFTU4All Project (May 2026)
- LACAC
- CARIBAVIA
- CARICOM
- ICAN 2026



MCAAP Project Activity: Status of Air Connectivity and Air Transport Liberalization in the CAR Region

The following activity approved by MCAAP represents the Phase 1 of bigger Project for enhancing Air connectivity and liberalization in the CAR Region. This Phase 1 includes: Hiring 1 Subject Matter Expert (SME) to conduct assessment of the CAR Region's air connectivity and level of liberalization based on Regional agreements and increase traffic forecast. The SME will also develop the respective workshop on the results for States and aviation stakeholders. Hold a 3-days bilingual workshop on Air transport policy, fees and charges in the ICAO NACC Regional Office (WK1) Hold a 3-days bilingual workshop/meeting on the CAR assessment results and develop/agree on a work plan for enhancing air connectivity and Air transport liberalization. Workshop to be carried out in a CAR State (WK 2)

Objectives/ deliverables: Report on the Status of Air Transport Implementation per State in the CAR Region with recommendations for enhancing air connectivity and air transport liberalization

Development of a 2026-2028 work programme on air transport implementation assistance.

Raise awareness on the recommendations to enhance air connectivity and liberalization

Implementation: 3Q 2026 - 2Q 2027

ICAO NACC Air Transport activities

Online training

Air Transport Regulation online course

Air Transport Regulation Issues online course

Air Transport Economics online course

Air Transport Economics for Airport Professionals online course

Introduction to Air Cargo Economics

In-person/Virtual training

Joint ICAO-ACI training on Airport User Charges

Regional workshop/seminar

Trainings for Member States

Thank You

