

2025

War on drugs: effects for Europe



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1. INTRODUCTION

Since last August, the United States initiated a war on drug trafficking in the Caribbean. The Caribbean is being patrolled by U.S. naval vessels, and troops have been deployed across the region.

It seems that **this deployment might hide other intentions** different from solely countering drug supply chains. Whether this is true or not, time will tell, these actions might have an impact on drug supply in Europe. Specifically, **cocaine supply might suffer some consequences** given that Colombia, Ecuador and Peru are the main suppliers.

U.S. attacks are spreading from the Caribbean to the Eastern Pacific and new types of kinetic actions are likely to occur.

2. U.S. DEPLOYMENT

The U.S. has expanded its military deployments in the Caribbean Sea since August. As of late October, the total number of U.S. military personnel deployed to the area amounted to **over 10,000**, representing thousands of additional military personnel deployed in the region.

The deployment includes major naval assets and specific military aircraft:

- **Warships:** The expansion of military deployments in the Caribbean Sea includes **at least eight U.S. warships** since August.
- **Aircraft Carrier Group:** The aircraft carrier **USS Gerald R. Ford** was deployed to the Caribbean in recent days. The USS Gerald R. Ford is described as the **world's largest warship**.
- **Strike Group Assets:** The USS Gerald Ford Carrier Strike Group includes **stealth fighter jets** and **surveillance aircraft**.
- **Bombers:** On **Oct. 23**, the United States flew **B-1 bombers** near Venezuela.
- **Specific Aircraft:** A U.S. Marine **V-22 Osprey** was reported taking off from the Jose Aponte de la Torre Airport on Sept. 13, 2025. Five F-35 have also been deployed to Ceiba base.

The deployment of the USS Gerald Ford Carrier Strike Group along with F-35s is an indication of the importance of the

effort that the U.S. is ready to carry out. It is a strong political message for drug cartels all over the region and not only to Maduro and his 'de los Soles' cartel.

The U.S. has designated some of the cartels operating in the region as terrorist organizations:

Name	Country
Cártel de Sinaloa	Mexico
Cártel de Jalisco Nueva Generación (CJNG)	Mexico
Cárteles Unidos	Mexico
Cártel del Noreste (CDN)	Mexico
Cártel del Golfo (CDG)	Mexico
La Nueva Familia Michoacana	Mexico
Tren de Aragua (TdA)	Venezuela
Mara Salvatrucha (MS-13)	El Salvador
Cártel de los Soles	Venezuela

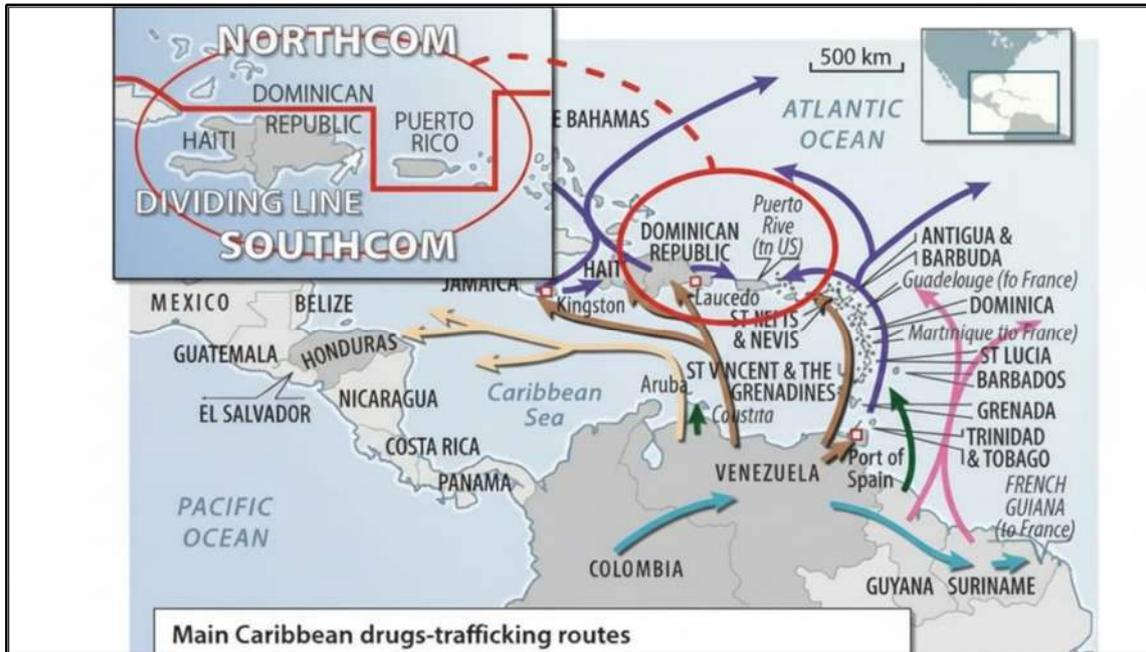
There are other **groups which are not technically cartels** such as the ELN, FARC and Segunda Marquetalia in Colombia, which have also been designated as Foreign Terrorist Organizations. In Ecuador, Los Lobos and Los Choneros have also been designated.

The huge deployment indicate that operations are going to last and are likely to spread to other areas¹. Trump has already offered his support to **Mexico**, which was not accepted so far, but **Ecuador** had already requested Trump's support. The same is valid for **Haiti**.

Colombia and Venezuela risk overreactions. Both have a strained relationship with Trump and attacks are targeting boats in their respective areas.

¹ Adm. **Alvin Holsey**, U.S. Navy (four-star), commander of U.S. Southern Command announced he will **retire at the end of 2025 (December)**, less than a year after taking command. Several outlets reported **unexplained/abrupt timing** amid controversy over U.S. strikes on suspected drug boats in the Caribbean, but the Pentagon has not provided a cause.

It is to be highlighted that the kinetic actions carried out so far are focusing on **supply chains which feed the United States**.



3. IS EUROPEAN DRUG COCAINE MARKET AFFECTED?

Based on recent events and long-term trafficking trends, a US crackdown in the Caribbean will likely have a counterintuitive effect: **it would have minimal impact on Europe's supply and could even reinforce the direct routes that are already flooding Europe with cocaine.**

In fact, European authorities are reporting the exact opposite.

It's crucial to understand that Europe is *not* facing a cocaine shortage. Europe is facing an unparalleled surplus of cocaine.

- **Record Seizures:** For the last several years, European countries—especially Belgium (Antwerp) and the Netherlands (Rotterdam)—have reported record-breaking, industrial-scale seizures of cocaine. In Spain, Valencia and Algeciras are also breaking records.
- **High Purity, Stable Price:** The cocaine on the street in Europe remains high in purity and relatively low in price. This combination is a classic economic indicator that supply is overwhelming, not scarce.

- **The "10% Rule":** Law enforcement officials widely estimate they are interdicting 10% or less of the total flow. The fact that seizures are at an all-time high suggests the *total amount* being shipped is astronomical.

The most important factor is that the supply chains for the US and Europe are now largely separate. A crackdown in one region has a limited effect on the other.

- **The US Route (Caribbean-Focused):** This is the route the US is targeting. It traditionally involves moving cocaine from Colombia/Ecuador up through the Caribbean islands or Central America/Mexico. US counternarcotics efforts (like the one you mentioned) are concentrated here.
- **The Europe Route (Direct Maritime):** This route **bypasses the US-patrolled Caribbean entirely**. Traffickers load cocaine directly into commercial shipping containers (often hidden in products like bananas or seafood) at massive South American ports (like Guayaquil in Ecuador and Santos in Brazil) and ship them directly across the Atlantic to Europe's largest ports (Antwerp, Rotterdam, and ports in Spain as mentioned before).

If the new US operation makes the Caribbean route significantly riskier, **cartels will not stop shipping**; they will simply adapt. This is known as the "**balloon effect**"—if you squeeze one part of the balloon, the air (or drugs) simply moves to another.

Here is the likely logistical impact:

- **Reinforcement of Direct European Routes:** Cartels will see the US-patrolled Caribbean as high-risk and the direct-to-Europe container route as lower-risk. They will divert *even more product* onto the already-massive maritime shipments to Antwerp and Rotterdam, **worsening the problem for Europe**.
- **Reactivation of Old Routes:** Cartels will also shift to secondary routes that bypass the Caribbean, most notably the **West African transit route**. Cocaine is shipped from South America to countries like Senegal, Guinea-Bissau, or Nigeria, and then trafficked north to Europe.
- **No Impact on Production:** The US operation targets *transit*, not *production*. The coca fields and processing labs in Colombia, Peru, and Bolivia will continue to

operate at full capacity, ensuring there is a massive supply ready to be shipped.

In summary, a US-led "war on drugs" in the Caribbean is a US-centric solution to a US-centric route. It will not cause scarcity in Europe because **European supply chains are now independent, more efficient, and operate on a different logistical track.**

As long as cocaine production is not affected (it'd require attacks on land) European cocaine market seems to remain one of the main problems for law enforcement.