

Explaining US Strategy Toward Venezuela

by Allison Fedirka - November 26, 2025

By now, it's clear that military deployments in the Caribbean Sea are not just about curbing drug trafficking and its associated threats to the United States. Earlier this week, the United States officially designated the Cartel of the Suns, a group Washington says is run by the Venezuelan government, as a terrorist organization. (In Venezuela, the Cartel of the Suns is an umbrella term that refers to corrupt government officials.) U.S. President Donald Trump recently said he would not rule out a ground invasion of Venezuela and raised the possibility of direct talks with President Nicolas Maduro. All the focus remains exclusively on Venezuela despite trafficking being present in other Caribbean locations. This prioritization of hemispheric security dramatically changes the risk-reward calculus for strategic issues in the region, most notably the issue of what to do with the Venezuelan government. The U.S. ultimately wants regime change, but it also wants to protect U.S. interests and assets. The military deployments, then, are just one part of a larger political and economic strategy to bring down Maduro.

Venezuela's strategic position in the southern Caribbean makes it essential to U.S. security. This is why the U.S. has supported regime change for more than two decades. The rise of Hugo Chavez to power in 1998 threatened long-standing U.S. business interests, particularly with regard to oil supplies, as he centralized power and increased government control over the economy. Chavez was proudly anti-U.S., so he became a natural ally to China, Russia and Iran, all of which eventually secured arms deals with Caracas. Washington interpreted these agreements as a security threat, of course, but it wasn't until Chavez died in 2013 that regime change seemed within reach. Oil prices tanked in 2014, stripping the government of the funds needed to support its populist policies. Chavez's successor, Nicolas Maduro, also inherited an economy that had been all but gutted through government intervention, manipulation and corruption.

From 2015 to 2019, the U.S. used political pressure and support for the Venezuelan opposition to pursue its plans for regime change. But these efforts ultimately failed; the opposition was too disorganized, and the ruling party's control over Venezuelan political institutions was too strong. The regime still intact, the U.S. began to progressively put more economic pressure on Venezuela (via sanctions) to achieve its goals. The recent military deployments to the Caribbean simply mark another evolution.

In theory, counternarcotics operations will exert enough economic and political pressure to break the foundations of the Maduro regime. The trafficking of illicit goods – not just drugs but arms, fuel, black market oil and gold – provides a not insubstantial amount of money to the government, so disruptions are sure to result in economic losses for Caracas. Disruptions will create tension between Maduro and key power supporters whose relationships rely heavily on exploiting and benefiting from black market operations that keep the regime afloat. The strategic logic is that if the U.S. cannot bring about regime change from without, perhaps it can do so by sowing discontent among its power brokers.

But this must also be accompanied by more direct efforts to oust Maduro, of which Washington has three options. The first is a negotiated settlement by which Maduro steps down and leaves Venezuela in exchange for certain security and financial guarantees. The second is some sort of direct U.S. military action against targets on Venezuelan soil. The third is to support covert activity to bring about a civil-military movement capable of deposing Maduro.

A negotiated settlement is essentially dead on arrival. It might be the most attractive and politically expedient option, but similar attempts in the past have invariably failed. The closest the Maduro government ever came to reaching an agreement was the 2023 Barbados accords, which, despite early success, fell apart during elections the following year as both sides accused each other of failing to hold up their side of the agreement. Talks will continue to flounder so long as the government maintains institutional influence and the political opposition stays weak, and so long as Washington and Caracas distrust each other.

Of these obstacles, the enduring reach of the ruling party is the biggest. Maduro does not speak for the entire government. Other players – such as Vladimir Padrino Lopez, who controls the military, Interior and Justice Minister Diosdado Cabello, who controls citizen security/repression forces, and the government of Cuba, which controls Venezuelan intelligence services – all have a say in executive decisions. Washington cannot grant favorable exit strategies for all these stakeholders, so they are unlikely to go along with whatever Washington puts out. Were Maduro to do so unilaterally, he would become a target for retribution. All this makes an orderly, negotiated transition unlikely.

A full-on U.S. invasion is also far-fetched. Direct, large-scale military intervention will be wildly unpopular at home and largely condemned abroad. According to a poll released by CBS this week, some 70 percent of respondents opposed military action against Venezuela. A poll released Nov. 14 by Ipsos showed that 55 percent of Americans believe the risks associated with military action in Venezuela outweigh the potential benefits. Trump's approval ratings have been in decline since

March, so the administration will likely think twice before spending this kind of political capital. (Political backlash in Latin America would be mixed. Some countries – Venezuelan neighbors like Trinidad and Tobago, the Dominican Republic, Guyana and Panama, and U.S. allies like El Salvador, Argentina, Ecuador and Panama – have voiced support for U.S. action. Others like Mexico and Cuba are firmly opposed, while Brazil and Colombia have been neutral.)

That the U.S. has a fundamental interest in protecting natural resource deposits and related infrastructure complicates military action further. Opposition to the regime has not stopped Washington from granting special waivers to protect Chevron and resuming oil imports from Venezuela. The country's oil industry would have to play a vital role in funding reconstruction efforts and creating investment opportunities for U.S. businesses seeking to expand influence in the region. It's also worth noting that Venezuelan oil is similar to that of Russia. If Maduro is ousted, Venezuela could offer itself as an alternative supplier to buyers of Russian oil, a move that would complement broader U.S. strategic interests. Venezuela also possesses critical mineral and gold deposits, so military action would jeopardize future commodities trade.

The recent military deployments should be seen at least in part as a show of force and in part as a reminder that the U.S. can impose a blockade at will. The B-52 bombers that recently left Minot air base, for example, did so with their trackers on and were thus an announced movement. More, Venezuela is armed with S-300 missile defense systems that can take out the bombers should they come within range; if the U.S. wanted to surprise attack Caracas, it would have used other assets in the region, not easily detectable B-52s. The naval strikes on drug trafficking vessels, meanwhile, are part of the U.S. campaign to apply economic pressure, not military pressure, on the government. Similar operations could also be conducted against ships carrying Venezuelan oil through those waters, as well as ships carrying goods to Venezuela. At this point, direct military action is the U.S.'s backup option should the third scenario prove difficult to realize.

The most likely scenario for regime change is the use of covert activity to support a civil-military overhaul of the government. This scenario reduces political consequences for the U.S., helps preserve physical assets/infrastructure, allows for more favorable conditions for a transition government to take hold, and comports with past U.S. activity in the region. In fact, there is evidence to suggest the U.S. is already pursuing this strategy. In addition to advertising CIA operations in Venezuela, Secretary of State Marco Rubio issued a warning to the Venezuelan military against supporting Maduro. Meanwhile, a suspicious fire at a petrochemical complex in Anzoategui and arrests of military and opposition members suggest sabotage and other covert activities.

This scenario also leaves room for a one-off, isolated kinetic strike by the U.S. After all, the current deployments in the Caribbean are not completely for show. Targets would likely be symbolic and military in nature – a Russian S-300 air defense system or an Iranian drone base, for example. An attention-grabbing strike would send the message that the U.S. is serious about regime change while giving opposition forces new opportunities to act, though cooperating civilians and members of the military would have to be willing to assume the potentially mortal risks associated with this kind of activity.

It's clear that Maduro's days are numbered. The U.S. has put itself in a corner, so it would be embarrassing to be seen as a failure now. The question is how and when change will happen.

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