

Military Operation in Jalisco Resulting in the Death of CJNG Leader “El Mencho” Triggers Security Volatility

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Executive Summary

On February 22, 2026, a military operation in the municipality of Tapalpa, Jalisco, Mexico resulted in the reported killing of Nemesio Rubén Oseguera Cervantes, known as “El Mencho,” founder and leader of the Jalisco New Generation Cartel (CJNG).

Oseguera was widely considered the most powerful active cartel leader in Mexico and one of the most influential transnational narcotics traffickers globally. Under his leadership, the CJNG evolved from a regional splinter group in 2010 into a vertically integrated criminal enterprise with presence across most of Mexico and distribution networks reaching the United States, Europe, Asia and Oceania.

The U.S. government had offered a reward of up to \$15 million for information leading to his capture. CJNG had been designated under multiple U.S. sanctions frameworks and was formally identified by U.S. authorities as a Foreign Terrorist Organization in prior contexts. Oseguera’s organization became a dominant force in fentanyl and synthetic drug trafficking into the United States, positioning the CJNG as a principal driver of the current opioid crisis.

CJNG’s rapid territorial expansion over the past decade—particularly in western Mexico, strategic ports such as Manzanillo and key precursor chemical routes—was closely associated with his leadership.

Within hours, coordinated retaliatory actions were reported across Jalisco and in neighboring states, triggering significant short-term disruption to mobility, commerce and travel in western Mexico. The episode represents one of the most consequential security developments in the region in recent years, not only because of the symbolic weight of the target but also because of the immediate operational effects observed across the Guadalajara Metropolitan Area (ZMG) and Puerto Vallarta.

Implications for Business

The immediate commercial effects have been concentrated in high-density economic nodes across ZMG and Puerto Vallarta.

Major retail and commercial centers in Guadalajara, Zapopan and Tlajomulco publicly announced closures or activated emergency security protocols. Malls including Galerías Santa Anita and Andares suspended operations. Midtown Jalisco and Forum Tlaquepaque activated precautionary measures.

Reports of commercial arson included the burning of at least one Costco location alongside damage to convenience stores and fuel-adjacent assets. The concentration of incidents in visible, consumer-facing commercial zones amplified both operational disruption and international media coverage.

Jalisco is one of Mexico’s most important industrial, logistics, technology and tourism hubs. Guadalajara is positioned as a technology cluster and innovation center, while Puerto Vallarta remains a major international tourism destination. The concentration of retaliatory activity in and around these zones ensures global media visibility.

The upcoming FIFA World Cup—with Guadalajara designated as a host city—heightens the sensitivity of international perception. Even short-term volatility can amplify narratives about security reliability, infrastructure resilience and federal-state coordination capacity. While infrastructure remains operational, international optics during the stabilization period will be closely monitored by investors, event organizers and diplomatic missions.

For businesses, the near-term risks are operational rather than structural:

- Corridor reliability and employee mobility
- Travel advisories affecting executive and tourist flows
- Heightened insurance and compliance scrutiny
- Reputational exposure for high-visibility brands
- The longer-term risk will depend on whether the organization stabilizes quickly or enters a period of fragmentation.

Longer-term implications depend on whether the CJNG stabilizes under new leadership or enters a period of fragmentation and localized volatility.

For multinational operators, the central question is not infrastructure integrity, which remains largely intact but the predictability of mobility, local enforcement capacity and corridor stability in western Mexico.

Immediate Mobility Shock and Disruption in Jalisco and Beyond

In Jalisco, authorities moved quickly to contain spillover risk following the security operation. The state government activated a “Code Red,” temporarily suspended public transportation and large-scale public events and ordered a preventive suspension of in-person classes for February 23. These measures were designed to stabilize mobility corridors and limit civilian exposure during the initial volatility window.

The operational impact concentrated in the Guadalajara Metropolitan Area (ZMG) and Puerto Vallarta, where coordinated vehicle burnings and road blockades disrupted commuter flows, logistics corridors and retail access. Multiple incidents involved the deliberate torching of buses, cargo trucks, private vehicles and fuel-adjacent assets along key arterial routes, forcing temporary closures and rerouting across the metropolitan road network.

Jalisco’s official evening update lists impacts across the following municipalities in the state (in addition to Tapalpa): Zapopan, Guadalajara, Puerto Vallarta, Tlajomulco de Zúñiga, Tonalá, San Pedro Tlaquepaque, El Salto, Ixtlahuacán de los Membrillos, Zapotlanejo, Juanacatlán.

The military operation in Tapalpa, Jalisco, that resulted in the death of Nemesio Rubén Oseguera Cervantes (“El Mencho”) triggered an immediate and severe mobility shock across the region. Within hours, coordinated retaliatory actions erupted not only in Jalisco but also rapidly spread to the southern part of the country. States such as Michoacán, Guerrero, Oaxaca, Chiapas, Veracruz, Tabasco and Puebla experienced similar patterns of violence, including road blockades, vehicle burnings and attacks on commercial establishments. These actions severely disrupted local transportation networks, hindered commercial logistics and heightened security concerns for both civilians and businesses. The swift expansion of violence underscored the operational reach of CJNG and the volatility of the security environment in the wake of the operation.

Aftermath and Post-Crisis Reactions

The aftermath of the operation that resulted in the death of CJNG leader “El Mencho” has unleashed a series of destabilizing reactions, both nationally and internationally. Among the most concerning developments has been the substantial increase in disinformation and misinformation disseminated through social media platforms. Many of these campaigns appear to be orchestrated by accounts allegedly managed or influenced by CJNG operatives. These efforts have included the distribution of doctored videos, fabricated reports of escalating violence and misleading claims about government actions. This deluge of false information has exacerbated public confusion and fear, making it increasingly difficult for citizens to discern accurate updates from official sources. The psychological impact of these disinformation campaigns has further deepened the sense of instability in the affected regions.

President Claudia Sheinbaum, who was on a work tour in the state of Coahuila and Durango, continued her scheduled activities while coordinating the government’s response remotely. During her morning presidential briefing, she provided detailed information about the military operation and assured the public of the government’s commitment to restoring order. Notably, the President acknowledged the intelligence support provided by the U.S. government, which had been instrumental in locating and targeting Oseguera. However, she emphasized that the planning and execution of the mission were led entirely by Mexican federal authorities and the army. This framing contrasted with statements from the White House, which highlighted the operation as a testament to the deep involvement and cooperation of U.S. intelligence and military resources. The contrasting narratives underscore the delicate balance between acknowledging international collaboration and asserting national sovereignty, particularly in the face of heightened public scrutiny.

As the immediate violence subsided, authorities implemented preventive measures to ensure public safety. Schools, universities and businesses in the most affected areas, including Guadalajara and Puerto Vallarta, were ordered to temporarily close their doors. Though there were no reports of new violent incidents by the morning of February 23, these closures reflected a cautious approach to mitigating risks and avoiding unnecessary exposure for civilians. This decision disrupted daily life and economic activity in key metropolitan and tourist hubs, further highlighting the far-reaching consequences of the crisis for ordinary citizens and local economies.

Public opinion has become sharply polarized in the wake of these events, with trust in the government emerging as a particularly contentious issue. On one hand, some segments of the population have praised the federal government for taking decisive action against one of the country’s most dangerous criminal leaders. On the other hand, critics have raised concerns about the transparency and effectiveness of the operation, as well as the government’s ability to manage the ensuing fallout. Social media has amplified these divisions, with misinformation campaigns further muddying the waters and driving wedges between opposing viewpoints. The result has been a highly fragmented public discourse, with many questioning whether the government’s actions will lead to long-term stability or merely spark further violence and uncertainty.

In the broader context, the operation and its aftermath have reignited debates about the militarization of Mexico’s security strategy. With major international events like the FIFA World Cup on the horizon and increasing pressure from the United States to intensify counter-cartel measures, the Mexican government may find itself compelled to expand its reliance on military solutions in the short term. However, experts warn that a narrow focus on arrests and military operations, without addressing the financial networks and corruption that sustain organized crime, will only perpetuate the cycle of violence. If the power vacuum left by the CJNG leader’s death is not filled by a stable and legitimate authority, it is likely to be seized by new criminal actors, leading to further fragmentation and localized volatility. This dynamic highlights the importance of complementing military actions with structural reforms aimed at dismantling the economic and political foundations of organized crime.

Internal Security Dynamics

The removal of “El Mencho” creates a structural inflection point for the CJNG. Unlike loosely federated criminal organizations, the CJNG’s rapid expansion over the past decade was closely tied to centralized leadership authority. The absence of a publicly recognized successor introduces three plausible internal dynamics.

1. Fragmentation and the “Hydra Effect”

The CJNG could fracture into regionally autonomous cells. Fragmentation does not imply de-escalation. Smaller groups often rely more heavily on immediate revenue generation, extortion, kidnapping, fuel theft and localized coercion, increasing risk for SMEs, logistics operators and municipal-level businesses. This scenario heightens unpredictability at the local level, particularly in secondary municipalities and transport corridors.

2. Violent internal succession struggle

An alternative scenario involves a concentrated internal purge, as senior regional commanders attempt to consolidate authority. In this scenario, violence becomes demonstrative and performative aimed at signaling dominance and deterring rivals. Historically, such internal consolidations can temporarily spike violence before stabilizing under a new command structure.

This would represent a short-term volatility spike rather than systemic collapse, but the transition window can be destabilizing in high-value corridors.

3. National Criminal Realignment

Oseguera’s death alters the balance of power across Mexico’s criminal landscape. Rival organizations may attempt to reclaim or contest strategic plazas in Colima, Michoacán, Guanajuato, Tamaulipas or along Pacific port infrastructure linked to precursor chemical flows. If competition expands geographically, the risk profile shifts from localized retaliation to broader inter-cartel competition affecting national logistics chains.

U.S. Dimension and Bilateral Implications

The operation carries immediate bilateral significance.

U.S. defense officials have confirmed that the operation received support from the Joint Interagency Task Force-Counter Cartel (JIATF-CC), a U.S. Northern Command task force established in January 2026 to identify, disrupt and dismantle cartel networks along the U.S.-Mexico border.

Oseguera had long been a priority target for U.S. law enforcement, with a \$15 million reward offered for information leading to his capture. Under President Trump, cartel activity—particularly fentanyl trafficking—has been framed not solely as a criminal matter but as a national security issue. The CJNG has been described by U.S. officials as a principal driver of synthetic opioid flows into the United States, and prior policy discussions have included expanded sanctions authorities, terrorist designations and cross-border security cooperation mechanisms.

If presented in Washington as a successful example of intelligence cooperation, the operation may be viewed as evidence of strengthened bilateral enforcement alignment. However, it may also raise expectations for sustained pressure on successor networks and financial infrastructure.

Should retaliation escalate or fragmentation increase instability, renewed policy discussions in Washington could include expanded sanctions authorities, deeper intelligence coordination or additional leverage in bilateral negotiations.

The U.S. political framing of this event will shape broader trade and diplomatic context.

Other International Reactions

The international community has responded swiftly to the crisis. Several foreign embassies, including those of the United States, Canada and European countries, have issued alerts warning of potential disruptions to tourism and business activities in affected regions. These advisories highlight concerns about safety, the reliability of transportation and the risk of further violence. Travelers and business operators have been urged to exercise caution, monitor local developments and review contingency plans. The U.S. Consulate in Tijuana, for example, specifically mentioned Jalisco, Baja California, Quintana Roo, Guanajuato, Guerrero, Michoacán, Oaxaca, Nuevo León and Tamaulipas as areas of concern. Other embassies have echoed these warnings, emphasizing the need for vigilance and preparedness.

Bottom Line

Mexico has seen this type of moment before. The 2019 “Culiacanazo” demonstrated how quickly cartel networks can generate coordinated urban paralysis in response to high-profile security operations.

The key question now is whether the state can maintain control without prolonged metropolitan immobilization. If corridor stability is restored within days and no sustained demonstrations of force follow, the episode will likely compress into a short-term volatility event. If retaliatory capacity remains visible or expands geographically, confidence in enforcement deterrence could erode more quickly. For businesses, the immediate concern is the reliability of metropolitan transport arteries, port access routes and airport ground connectivity.

If Washington frames the operation as the beginning of intensified counter-cartel enforcement, pressure on financial networks and logistics nodes could expand. If stabilization holds, bilateral security cooperation may remain operational rather than politically escalatory.

The next 2-4 weeks will clarify whether this episode becomes a contained retaliatory shock or the opening phase of a broader security realignment.

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