



# Trends, Analysis & Threats Webinar Summary

November 5, 2025

## ORS Program Overview

Christopher Jakim | HIDTA Deputy National Coordinator, Overdose Response Strategy

The **Overdose Response Strategy** is a unique collaboration between public health and public safety to reduce overdose deaths. The work of the ORS program is carried out by 61 ORS teams, comprised of a Drug Intelligence Officer and a Public Health Analyst, covering all 50 states, D.C., Puerto Rico and the U.S. Virgin Islands.

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## National Overdose Data Snapshot

Steve Barnes | Technical Advisor, Overdose Response Strategy

- **As of September 2025**, reported overdose deaths declined 26% for the 12-month period ending in April 2025 compared to April 2024, reflecting the lowest 12-month total since early 2020. Decreases vary by state.

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## Presenters

Dr. Kenn E. Dunklee | DEA National Forensic Laboratory Information System (NFLIS)

Dr. Agnes D. Winokur | Laboratory Director, DEA Special Testing and Research Laboratory

## Fentanyl Purity Declining

- **Fentanyl Powders**: Purity has declined from ~20% (2023) → ~11% (2024) → ~10% (2025 YTD).
- **Fentanyl Tablets**: Average tablet concentration is trending down to ~1.6 mg/tablet in 2025 YTD (down from ~1.9 mg in 2024; 2.4mg in 2023).

## Xylazine & Medetomidine

- **Xylazine**: Adulteration with xylazine is trending down but absolute numbers are still substantial.
- **Medetomidine**: Increasing on the East Coast and entering new markets; often co-occurs with xylazine.
- **Xylazine and medetomidine don't respond to naloxone** and may cause prolonged sedation/withdrawal.

## Carfentanil

- **Increasing seizure size**: DEA labs are reporting increasing size of carfentanil seizures in 2025, including 20+ kg exhibits in Arizona and Washington. Carfentanil purity in seizures is typically well under 1%. These figures refer to the total weight of carfentanil containing exhibits, not pure carfentanil.
- **Shift toward tablets**: Compared with earlier years, carfentanil is increasingly found in tablet form, often in thousands-of-tablet seizures.
- **Purity & analytical challenge**: With carfentanil usually present only at trace levels (often <1%), labs should use methods and sampling strategies that account for tablet-to-tablet variability and very low purity.

## Regional Trends

- **NFLIS regional snapshot**: Cocaine leads in the Northeast, while methamphetamine leads in all other regions. Visit the [NFLIS home page](#) to request an account and perform your own queries of the available data.
- **SLIDeR Reports**: Coming soon to NFLIS website to deliver faster, focused state-lab intelligence.

## Notable/Emerging Items

- **Spirochlorphine** (synthetic opioid): Detected in Midwest/Northeast submissions as part of polydrug mixtures.
- **Methamphetamine purity declines**: 2025 lab profiles show dips below the historically >95% purity range.
- **Nitazenes**: Nitazenes continue to surface across regions in small but consequential numbers.
- **7-OH**: New analytical methods are being validated to support detection and reporting.