



# Trends, Analysis & Threats Webinar Summary

January 7, 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. Learn more on our website, and [contact the ORS team in your jurisdiction](#) to collaborate.

## 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.

## Key Takeaways

- **U.S. overdose deaths are down ~30% from the summer 2023 peak** but remain ~4x higher than 1999. Declines reflect multiple forces, including demographic shifts and local conditions.
- **Medetomidine:** major concern that began emerging in mid-2024 and is increasingly adulterating or, in some markets, replacing fentanyl. Withdrawal from medetomidine poses life threatening complications.
- **Methamphetamine co-use alongside fentanyl is accelerating:** In Millennium Health's 2025 clinical UDT data, meth was detected in 72.4% of fentanyl-positive specimens (15.5% increase from 2024). Regionally, the South saw the sharpest rise (+40.7% from 2024), while the **West remained highest overall (85.0% in 2025)**.

## Millennium Health - Insights from Clinical Urine Drug Testing Data

Dr. Levi Bolin, PhD | Associate Director, Clinical Affairs, Millennium Health

Millennium Health is a specialty clinical lab that provides drug testing services to SUD treatment, behavioral health, and primary care providers. Shared insights reflect testing among adult patients between 2016–2025.

- **Polysubstance use is the rule, not the exception, among people using fentanyl:** In 2025, ~82.5% of fentanyl-positive specimens also contained an illicit stimulant (methamphetamine and/or cocaine), while ~20.3% had fentanyl plus heroin and/or prescription opioid.
- **Fentanyl detection has been volatile but generally fell throughout 2025** after a late-2024/early-2025 rebound.
- **Signal to watch:** overall stimulant detection in this population is now higher than fentanyl, and stimulant use without fentanyl rose to roughly the same detection rate as fentanyl in 2025.

## Street Drug Supply Update & 2026 Watchlist

Dr. Nabarun Dasgupta, MPH, PhD | Senior Scientist, University of North Carolina

- **Demographics of overdose risk are shifting by generation:** Overdose deaths remain concentrated among **Gen X and Millennials (~70%)**, with **Millennials** carrying the highest burden. Declines may reflect a combination of factors including less risky use patterns, older cohorts 'aging out', and fewer youth initiating fentanyl use.
- The share of 2025 **samples sold as fentanyl that actually contain fentanyl has dropped to ~70%** (~60% in Pittsburgh), reinforcing how adulteration/substitution degrades predictability in the drug supply.
- **Medetomidine withdrawal risk changes treatment planning:** abruptly stopping medetomidine can trigger life-threatening hypertension, complicating treatment initiation in residential and outpatient settings. Some partners are referring people with high medetomidine exposure to start treatment in a hospital setting.
- **Numbing agents (lidocaine/procaine/tetracaine):** began as an East Coast phenomenon, now spreading; Procaine is a concern due to potential serious cardiac complications.
- **Dominant nitazene species** may change in 2026, possibly influenced by international supply conditions.
- **Rare, but notable:** methadone analogues (e.g., dipyanone, IC-26) and the newer "orphines" class of synthetic opioids (e.g., brorphine, cyclorophine); **observations are currently rare.**

## Webinar Materials and Additional Resources

Webinar recording, slides, and other materials are posted on the ORS website under [TAT Webinars](#). Links below include referenced materials as well as our featured speakers' recommended further reading.

- [UNC Street Drug Analysis Lab](#)
- [Millennium Health Emerging Threat Intelligence \(ETI\) Program](#)
- [Millenium Health Signals Reports](#)
- [Millenium Health Signals Alert: Stimulant Use Soars, Effective Interventions Desperately Needed](#)
- [Millenium Health Publications](#)
  - [Generating Timely Estimates of Overdose Deaths for the US Using Urine Drug Test Data](#)
  - [Analysis of Urine Drug Test Results From Substance Use Disorder Treatment Practices and Overdose Mortality Rates, 2013-2020](#)
- [Northwestern University “OD Pulse” Dashboard](#)