



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., buporphine, cyclophorine); **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](#)