



Trends, Analysis & Threats Webinar Summary

September 2026

ORS Program Overview

Christopher Jakim | HIDTA 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 August 2026, reported overdose deaths have declined about 13% for the 12-month period ending March 2026, representing a continuation of the downward trend from the 2023 peak. However, regional variation persists, with some Western states trending upward despite the national decline.

An Update on Current Drug Use Trends: Insights from Clinical Urine Drug Testing (UDT) Data

Levi Bolin, PhD | Director, Clinical Affairs, Millennium Health

- **After falling sharply during what researchers hypothesize was a fentanyl “supply shock”** in 2024, fentanyl concentrations in Western U.S. UDT specimens rebounded between September 2024 and April 2025. Fentanyl-related overdose mortality also increased across the region during this period.
- **Recent UDT data from the Western U.S. show another sharp rise in fentanyl concentrations**, beginning in November 2025 and reaching an all-time high in May 2026. While too early to know if the West will repeat the mortality pattern seen after the 2024 supply shock, this trend warrants monitoring as an early warning signal.
- **Fentanyl concentrations and detection rates in the Eastern US** have remained at or below January 2024 levels, rising only slightly through the first half of 2026.
- **Fentanyl and illicit stimulant detection rates increased in all age groups from 2018 through mid-2026.** The most persistent and pronounced increases were among older adults, particularly ages 55-64 and 65-74. These increases among older adults are consistent with recent demographic shifts in overdose mortality data, highlighting the need for increased attention to address illicit drug use in this vulnerable population.

Recent Trends in Fentanyl, Heroin, Methamphetamine, & Cocaine

Edward Sisco | Research Chemist, National Institute of Standards and Technology (NIST)

- **Fentanyl adulteration** has been more pronounced in the East* than the West since 2024, data from 2026 suggest adulteration in the East may be easing slightly.
- **Median fentanyl concentration** has held steady in West samples and fell roughly 56% in East samples between Q1 2025 and Q2 2026. The falling median concentration in East coast samples does not mean high-potency material has disappeared and samples above 50% fentanyl are still being found.
- **Medetomidine detection in fentanyl samples**, driven almost entirely by the East, rose sharply in the second half of 2024, peaked in early 2025, and has declined steadily since. The decline is not uniform and some sites in the East remain near 100% prevalence. Medetomidine remains a minor adulterant in the West.
- **Xylazine prevalence** in the East has been declining steadily since early 2024; a smaller rise in West xylazine detections overlapped with the 2024 fentanyl supply shock. In Q2 2026, samples containing both high fentanyl and high xylazine concentrations increased notably; what is driving this is not yet known.
- **Methamphetamine prevalence and purity** have stayed high and consistent in both regions. When meth does turn up with fentanyl, the pattern is a trace amount of meth in a fentanyl sample, not the other way around.
- **Cocaine prevalence** has climbed steadily in the East, both alone and alongside fentanyl. In the West, cocaine overall is up, but co-detection with fentanyl has dropped since early 2025.
- **Unknown compounds** that do not match laboratory libraries have increased notably over the past year.

*Data references two regions - East of the Mississippi and West of the Mississippi river.

Webinar Materials and Additional Resources

Webinar materials are posted on the ORS website. Links below include referenced materials as well as related resources.

- [CDC Overdose Prevention Data Channel](#)
- [Millennium Health Signals Report – Volumes 8 and 8.1](#)
- [NIST Rapid Drug Analysis and Research \(RaDAR\) program](#)
- Vangelov et al. – [“Did the illicit fentanyl trade experience a supply shock?” \(Science, January 2026\)](#)