Trends, Analysis & Threats Webinar Summary

November 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 October 2026, there were about 65,000 lives lost to overdose for the 12-month period ending May 2026, roughly 9,000 fewer lives lost when compared to the same 12-month period from the previous year. Most states are declining, but the range is wide, from a 55% decrease in Oregon to a nearly 29% increase in New Mexico.

Insights from CFSRE's Novel Psychoactive Substances (NPS) Discovery Program

Alex J Krotulski, PhD | Center for Forensic Science Research and Education, Fredric Rieders Family Foundation

Current Drug Landscape:

- **Fentanyl purity varies sharply by region and has not steadily declined.** Average fentanyl purity in CFSRE samples is ~ 6% nationally: roughly 17% in the West, 4–5% in New England and the Mid-Atlantic, 1% in the Midwest.
- **Medetomidine is now more common than xylazine, driven by the Mid-Atlantic.** Medetomidine appeared in roughly 40% of fentanyl samples in 2026, versus about 10% for xylazine. Average medetomidine content has leveled off at about 10–15%.
- **Orphines spread rapidly Following China's class-wide scheduling of nitazenes in July 2025**. The leading orphine, cychlorphine, appeared in CFSRE cases from half of U.S. states within three to six months. By Q3 2026, orphines were detected about as often as nitazenes, and CFSRE had identified them in 231 death investigations, led by Tennessee (71), Texas (43), and Illinois (27). China scheduled orphines as a class in October 2026.

Kratom Alkaloid Market:

- **Kratom products have evolved through several "generations."** These alkaloids now appear in many forms including pills, powders, gummies, and drinks.
  - The market moved from plant kratom (mitragynine) to concentrated 7-OH (7-Hydroxy mitragynine) in 2023–2024.
  - In 2025, it shifted to MP (mitragynine pseudoindoxyl) and MGM-15 (dihydro-7-hydroxymitragynine).
- **Testing gaps mean these deaths are undercounted**. CFSRE has identified MGM-15 in deaths from 11 states. Few toxicology labs test for these alkaloids.
- **Product labels don't always match what's inside**. In CFSRE testing, some products matched their advertised contents and others did not. Product availability changes rapidly, which has made it difficult to purchase the same product from the same shop over consecutive months.
- **Federal controls are expected soon, but the market will likely keep shifting**. Under proposed federal temporary scheduling (October 2026), 7-OH and MP would be controlled above a set threshold, while MGM-15 and MGM-16 are banned outright. The threshold for liquids would still allow nearly 30 mg of 7-OH in a typical 30 mL shot, which could push sales toward liquids.
- **New "13-OH" and "kratom + nootropics" products are already appearing**, and mushroom products containing novel tryptamines are growing rapidly.

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
- CFSRE NPS Discovery Smoke Shop Testing
- CSFRE Forensically-Relevant Drug Database
- Federal Register notices (Oct. 14, 2026): 7-OH & MP (threshold) | MGM-15 & MGM-16
- ORS TAT Webinars – slides, summaries, and recordings