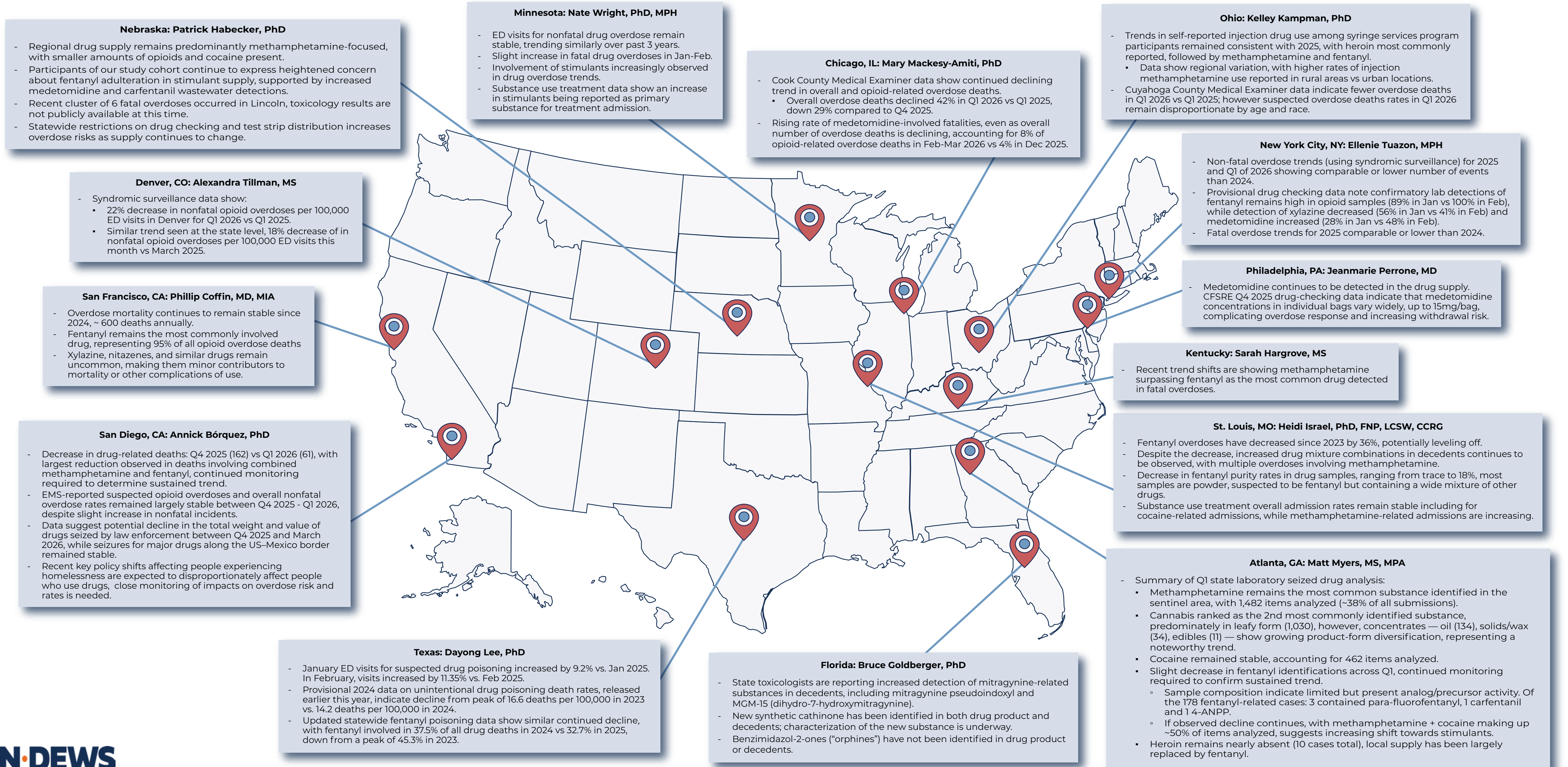


Sentinel Site Report - Q1 2026 in Review: What notable changes or signals in drug supply, overdose indicators, and other substance use trends were observed between January and March 2026?



Nebraska: Patrick Habecker, PhD

- Regional drug supply remains predominantly methamphetamine-focused, with smaller amounts of opioids and cocaine present.
- Participants of our study cohort continue to express heightened concern about fentanyl adulteration in stimulant supply, supported by increased medetomidine and carfentanil wastewater detections.
- Recent cluster of 6 fatal overdoses occurred in Lincoln, toxicology results are not publicly available at this time.
- Statewide restrictions on drug checking and test strip distribution increases overdose risks as supply continues to change.

Minnesota: Nate Wright, PhD, MPH

- ED visits for nonfatal drug overdose remain stable, trending similarly over past 3 years.
- Slight increase in fatal drug overdoses in Jan-Feb.
- Involvement of stimulants increasingly observed in drug overdose trends.
- Substance use treatment data show an increase in stimulants being reported as primary substance for treatment admission.

Ohio: Kelley Kampman, PhD

- Trends in self-reported injection drug use among syringe services program participants remained consistent with 2025, with heroin most commonly reported, followed by methamphetamine and fentanyl.
 - Data show regional variation, with higher rates of injection methamphetamine use reported in rural areas vs urban locations.
- Cuyahoga County Medical Examiner data indicate fewer overdose deaths in Q1 2026 vs Q1 2025; however suspected overdose deaths rates in Q1 2026 remain disproportionate by age and race.

Denver, CO: Alexandra Tillman, MS

- Syndromic surveillance data show:
 - 22% decrease in nonfatal opioid overdoses per 100,000 ED visits in Denver for Q1 2026 vs Q1 2025.
 - Similar trend seen at the state level, 18% decrease of in nonfatal opioid overdoses per 100,000 ED visits this month vs March 2025.

Chicago, IL: Mary Mackesy-Amiti, PhD

- Cook County Medical Examiner data show continued declining trend in overall and opioid-related overdose deaths.
 - Overall overdose deaths declined 42% in Q1 2026 vs Q1 2025, down 29% compared to Q4 2025.
- Rising rate of medetomidine-involved fatalities, even as overall number of overdose deaths is declining, accounting for 8% of opioid-related overdose deaths in Feb-Mar 2026 vs 4% in Dec 2025.

New York City, NY: Ellenie Tuazon, MPH

- Non-fatal overdose trends (using syndromic surveillance) for 2025 and Q1 of 2026 showing comparable or lower number of events than 2024.
- Provisional drug checking data note confirmatory lab detections of fentanyl remains high in opioid samples (89% in Jan vs 100% in Feb), while detection of xylazine decreased (56% in Jan vs 41% in Feb) and medetomidine increased (28% in Jan vs 48% in Feb).
- Fatal overdose trends for 2025 comparable or lower than 2024.

San Francisco, CA: Phillip Coffin, MD, MIA

- Overdose mortality continues to remain stable since 2024, ~ 600 deaths annually.
- Fentanyl remains the most commonly involved drug, representing 95% of all opioid overdose deaths
- Xylazine, nitazenes, and similar drugs remain uncommon, making them minor contributors to mortality or other complications of use.

Philadelphia, PA: Jeanmarie Perrone, MD

- Medetomidine continues to be detected in the drug supply. CFSRE Q4 2025 drug-checking data indicate that medetomidine concentrations in individual bags vary widely, up to 15mg/bag, complicating overdose response and increasing withdrawal risk.

San Diego, CA: Annick Bórquez, PhD

- Decrease in drug-related deaths: Q4 2025 (162) vs Q1 2026 (61), with largest reduction observed in deaths involving combined methamphetamine and fentanyl, continued monitoring required to determine sustained trend.
- EMS-reported suspected opioid overdoses and overall nonfatal overdose rates remained largely stable between Q4 2025 - Q1 2026, despite slight increase in nonfatal incidents.
- Data suggest potential decline in the total weight and value of drugs seized by law enforcement between Q4 2025 and March 2026, while seizures for major drugs along the US-Mexico border remained stable.
- Recent key policy shifts affecting people experiencing homelessness are expected to disproportionately affect people who use drugs, close monitoring of impacts on overdose risk and rates is needed.

Kentucky: Sarah Hargrove, MS

- Recent trend shifts are showing methamphetamine surpassing fentanyl as the most common drug detected in fatal overdoses.

St. Louis, MO: Heidi Israel, PhD, FNP, LCSW, CCRG

- Fentanyl overdoses have decreased since 2023 by 36%, potentially leveling off.
- Despite the decrease, increased drug mixture combinations in decedents continues to be observed, with multiple overdoses involving methamphetamine.
- Decrease in fentanyl purity rates in drug samples, ranging from trace to 18%, most samples are powder, suspected to be fentanyl but containing a wide mixture of other drugs.
- Substance use treatment overall admission rates remain stable including for cocaine-related admissions, while methamphetamine-related admissions are increasing.

Texas: Dayong Lee, PhD

- January ED visits for suspected drug poisoning increased by 9.2% vs. Jan 2025. In February, visits increased by 11.35% vs. Feb 2025.
- Provisional 2024 data on unintentional drug poisoning death rates, released earlier this year, indicate decline from peak of 16.6 deaths per 100,000 in 2023 vs. 14.2 deaths per 100,000 in 2024.
- Updated statewide fentanyl poisoning data show similar continued decline, with fentanyl involved in 37.5% of all drug deaths in 2024 vs 32.7% in 2025, down from a peak of 45.3% in 2023.

Florida: Bruce Goldberger, PhD

- State toxicologists are reporting increased detection of mitragynine-related substances in decedents, including mitragynine pseudoindoxyl and MGM-15 (dihydro-7-hydroxymitragynine).
- New synthetic cathinone has been identified in both drug product and decedents; characterization of the new substance is underway.
- Benzimidazol-2-ones ("orphines") have not been identified in drug product or decedents.

Atlanta, GA: Matt Myers, MS, MPA

- Summary of Q1 state laboratory seized drug analysis:
 - Methamphetamine remains the most common substance identified in the sentinel area, with 1,482 items analyzed (~38% of all submissions).
 - Cannabis ranked as the 2nd most commonly identified substance, predominately in leafy form (1,030), however, concentrates — oil (134), solids/wax (34), edibles (11) — show growing product-form diversification, representing a noteworthy trend.
 - Cocaine remained stable, accounting for 462 items analyzed.
 - Slight decrease in fentanyl identifications across Q1, continued monitoring required to confirm sustained trend.
 - Sample composition indicate limited but present analog/precursor activity. Of the 178 fentanyl-related cases: 3 contained para-fluorofentanyl, 1 carfentanil and 1 4-ANPP.
 - If observed decline continues, with methamphetamine + cocaine making up ~50% of items analyzed, suggests increasing shift towards stimulants.
 - Heroin remains nearly absent (10 cases total), local supply has been largely replaced by fentanyl.