



Funded by the Office of National Drug Control Policy and
the Centers for Disease Control and Prevention

Trends in the Illicit Drug Market

*Washington Overdose Response Strategy Team and
Northwest HIDTA
August 12, 2025*



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Federal Acknowledgement

*This presentation was supported **in-part** by the Centers for Disease Control and Prevention (CDC) of the U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$11,000,000 with 100 percentage funded by CDC/HHS. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, CDC/HHS or the U.S. Government.*



Northwest HIDTA

- Mission: to disrupt illicit drug market and support public safety and health partners
- Law enforcement drug task forces
- Investigative Support Center
- Prevention and Treatment
 - Grant funding
 - Overdose Response Strategy



Overdose Response Strategy

- Joint program between HIDTAs and the CDC Foundation
- Navigate both public health and law enforcement worlds
- Facilitate information sharing
 - Drug Trends report
 - Cross-agency initiatives
 - ODMAP



> Current drug trends



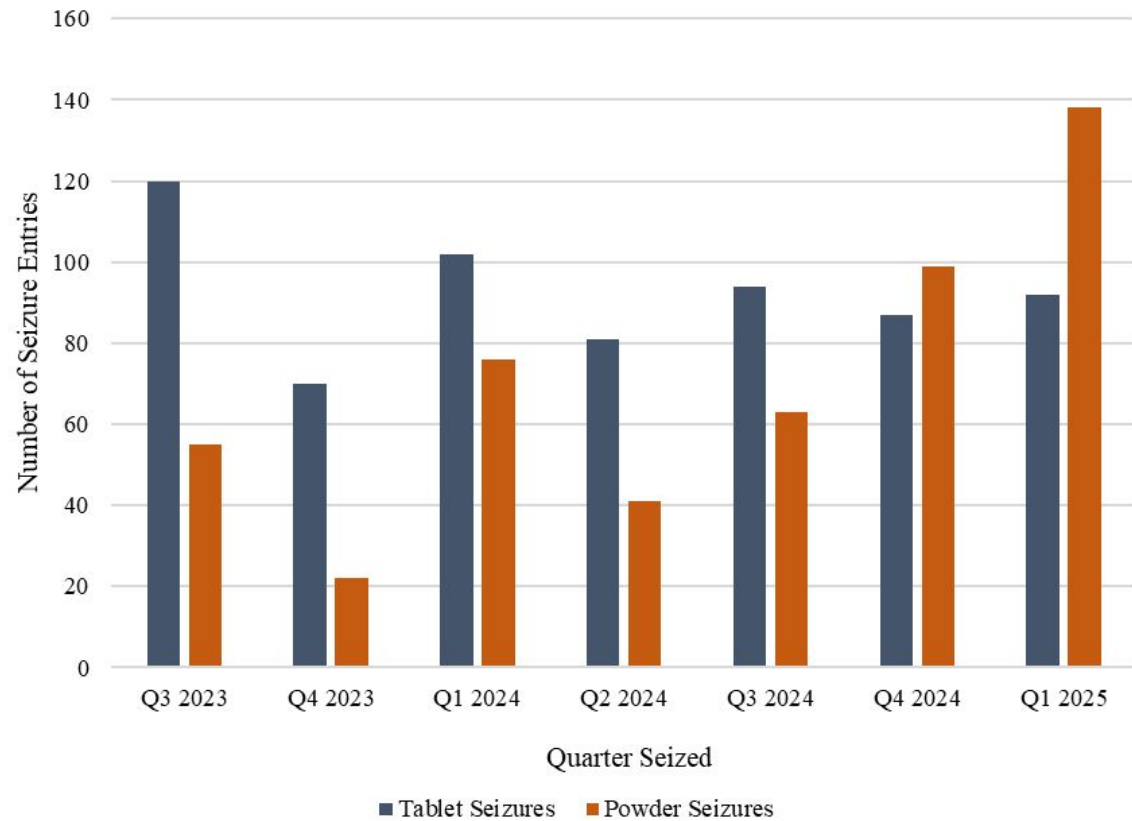
Fentanyl purity

- Average pill purity: less than 2 mg (with reports of recent decreases)
- Average powder purity decreases from 49% at Southwest border to roughly 15% in WA
- Overdose risk: powder purity varies greatly (2% to 89% in WA)
- Purity often untested

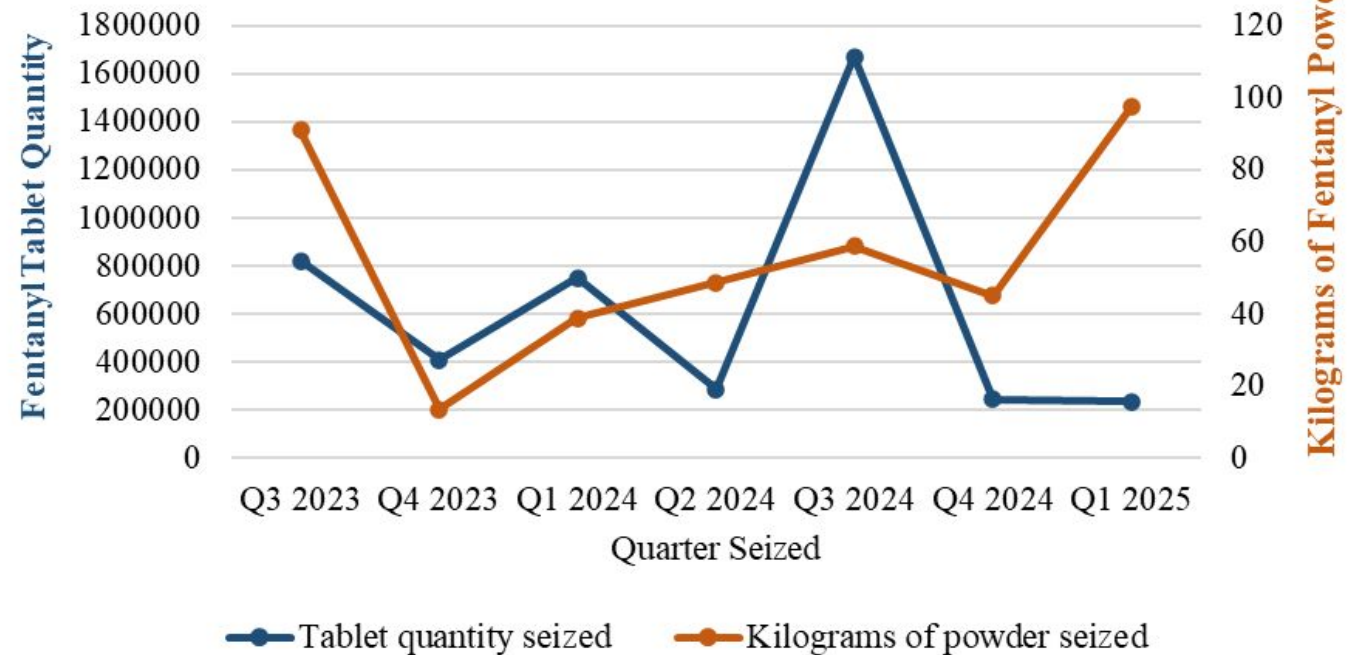


Fentanyl seizures in Northwest HIDTA counties

Fentanyl powder seizures outnumber tablet seizures for the first time in quarter 4, 2024.



Kilograms of seized powder more than doubled in quarter 1, 2025.



Fentanyl quality

- Mid-2024: decrease in purity and quality
- Reports of low quality from PWUD
- Increase in BTMPS (detected June 2024)
- Winter 2024: return to normal levels
- 2025: Frequent dips in quality alongside overdose fluctuations

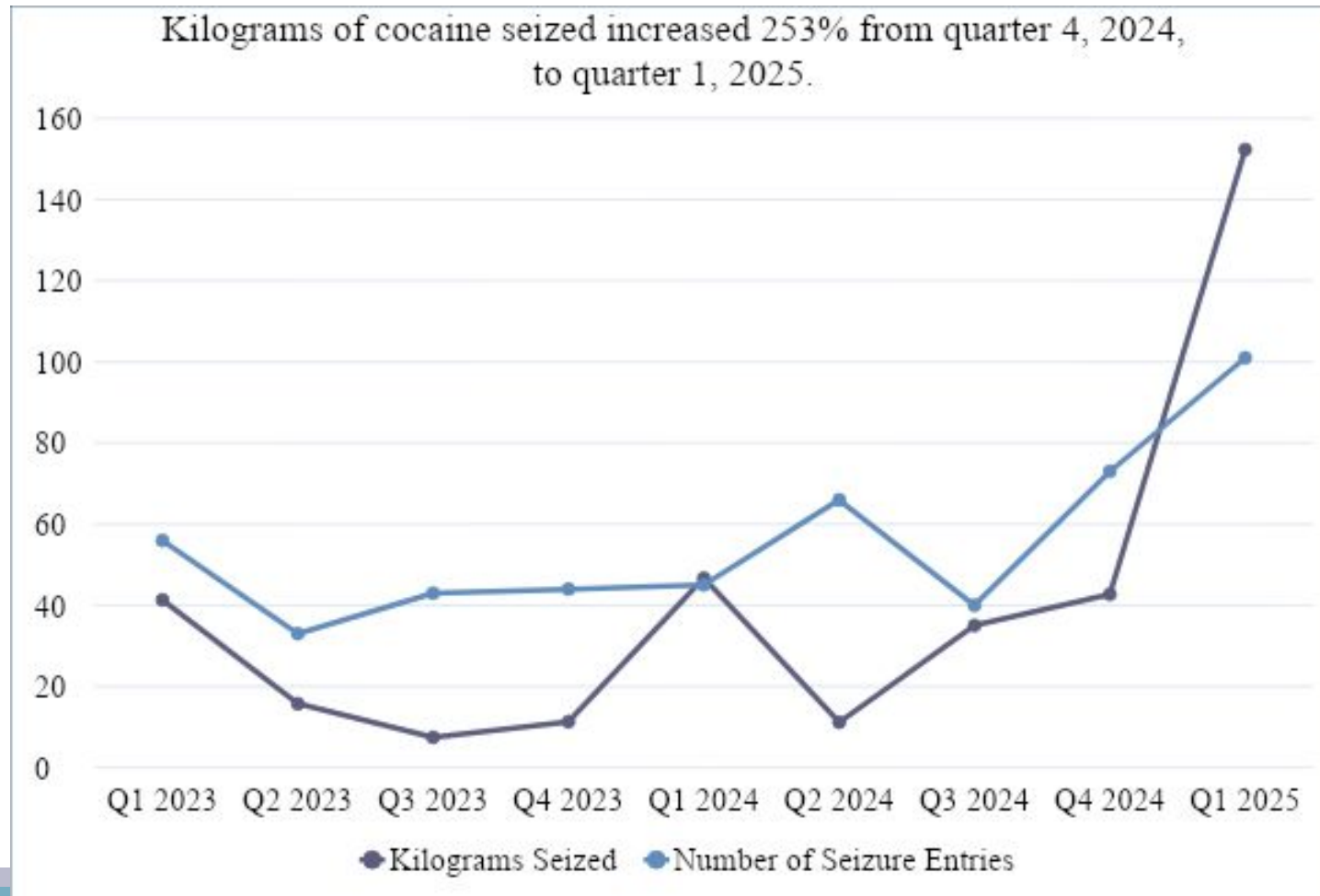


Cocaine

- 2021: Bumper crop in Columbia and decreased eradication of coca plant leading to increased production
- Late 2023: increases in cocaine across the state and nationwide
- Statewide use among wide cross-section of demographic groups
- Predominantly powder, cocaine base seen in small amounts
- Average street level purity: 50 – 60%



Cocaine seizures in Northwest HIDTA counties

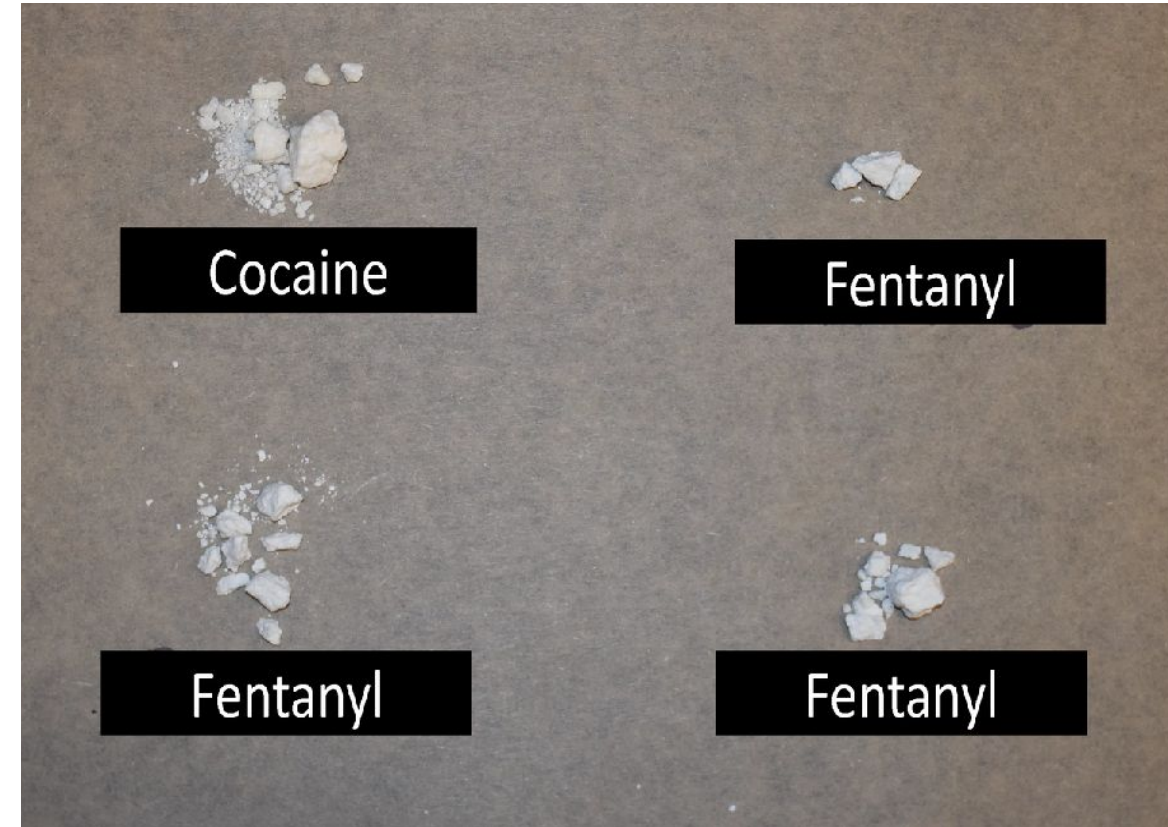


Average price
per gram: \$79



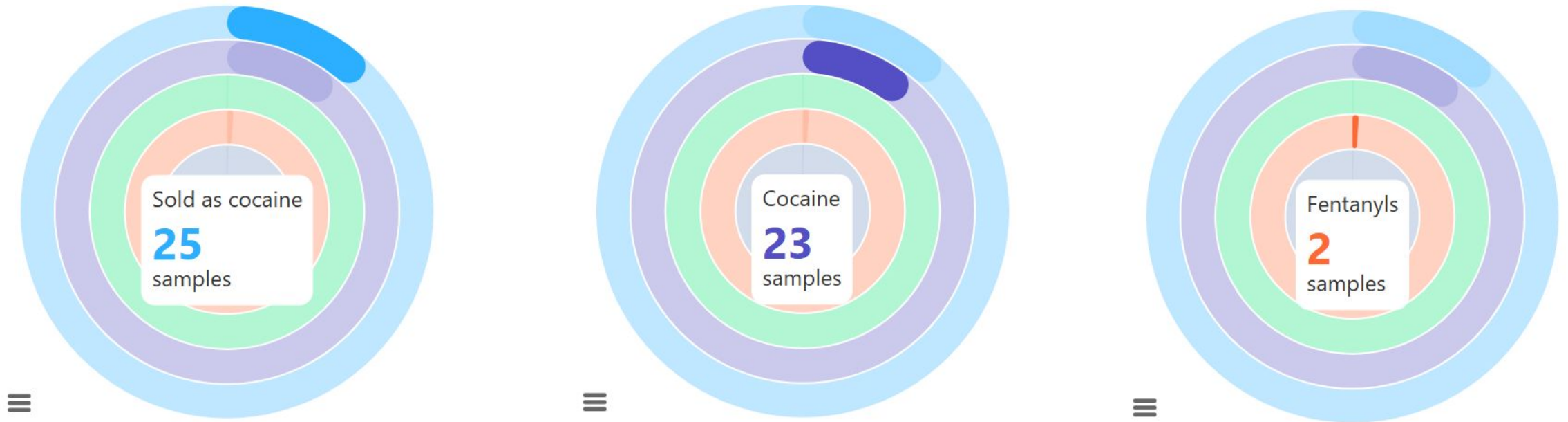
Fentanyl and cocaine confusion

- Community concerns of fentanyl laced into cocaine
- Instances of fentanyl-related overdoses in cocaine users. Possible explanations:
 - Powder confusion
 - Cross-contamination
 - No confirmed reports of large-scale mixing of opioids and cocaine at wholesale level



Cocaine samples from ADAI Drug Checking Program

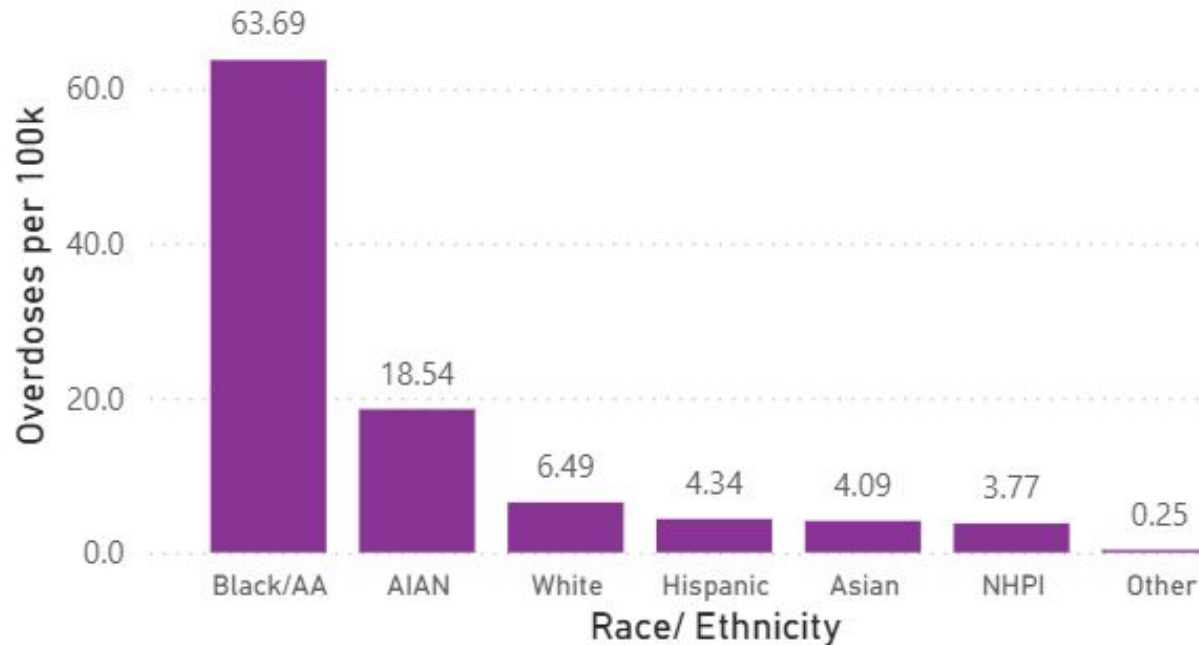
Substances found in "cocaine" samples in Washington, March to May 2025



Demographic trends among fatal cocaine overdoses

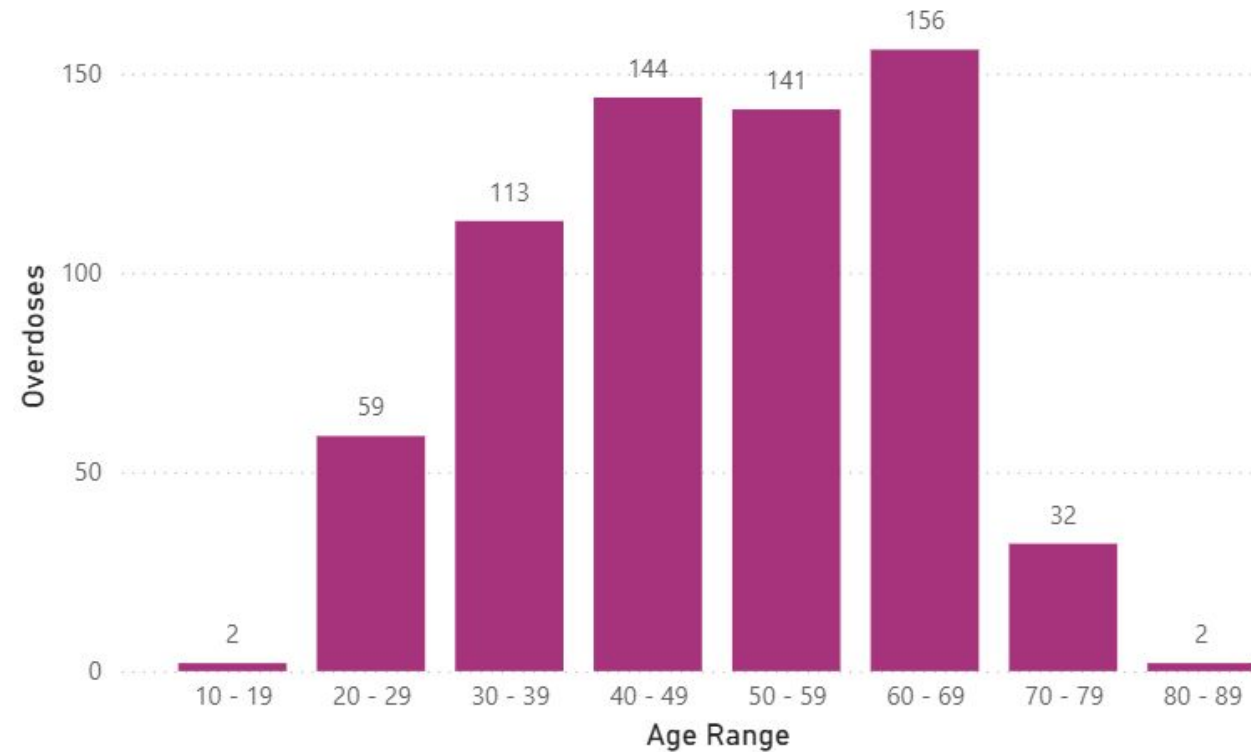
Cocaine Involved Overdose Fatality Rate by Race/Ethnicity

February 2024 - February 2025



Cocaine Involved Overdose Fatalities by Age Group

February 2024 - February 2025



Source: King County Medical Examiner's Office



Methamphetamine

- Second most common substance contributing to overdose
- 10-year upward trend in overdoses
- Consistent market
- Incredibly high purity (average roughly 97% in Pacific Northwest)
- Industrialized P2P method
- Most common form is crystal



Fillers and adulterants

Common filler substances:

- Acetaminophen (fentanyl pills)
- Mannitol (fentanyl powder)
- Caffeine (fentanyl powder and cocaine)
- Lidocaine (cocaine)

Encountered less frequently:

- Xylazine
- Ketamine
- Nitazenes
- Carfentanil
- BTMPS



BTMPS

- Bis(2,2,6,6-tetramethyl-4-piperidyl) sebacate
 - Industrial chemical to prevent UV degradation in plastic
 - Reports of chemical smell (bug spray, plastic)
- Disruption to precursor flow
- Proliferated in supply summer of 2024
- Decreased opioid tolerance and higher risk for overdose



Carfentanil

- Extremely potent synthetic opioid
- More prevalent on east coast, but still uncommon
- Pill seizure in California
- Rare, isolated events in WA:
 - 6 fatal overdoses in 2024, 2 in 2025 (King County)*



*preliminary data from King County Medical Examiner's Office



Washington source states

Oregon

- Large increase in cocaine

Arizona

- Increase in pharmacy robberies
- Less fentanyl seizures

California

- Decrease in fentanyl and fewer seizures
- Similar fentanyl quality and variability
- Increase in cocaine
- Recent BTMPS and carfentanil seizure

British Columbia

- Fentanyl locally produced, not moving south
- Benzodiazepines in powder
- Street-level purity for fentanyl powder averages 16%



Questions?

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