U.S. Medical Affairs
2026 Trends Insights Report: 3/1/26-3/14/26

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Respiratory (RP)

What the data is showing us:

- Respiratory Syncytial Virus (RSV) **remains elevated nationally**, with detection rates remaining largely stable across all four regions. The **Northeast, South, and Midwest** regions maintained rates of roughly **6-7%** while the **West** has climbed to **12%**.
- Human Rhinovirus/Enterovirus (HRV/EV) **continues to be a dominant pathogen nationally**, with persistently high activity, even returning to the most commonly detected target across all regions for the week of March 8th. Over the three-week period, HRV/EV fluctuated in the **Northeast (8.1% → 7.1% → 8.9%)** and **South (14.8% → 17.2% → 16.5%)** and rose slightly in the **West (11.5% → 11.8% → 13.0%)**, and the **Midwest (7.1% → 6.9% → 8.4%)**.
- Endemic coronavirus activity has started to wane in some regions. Coronavirus HKU1 maintains medium/high activity in all regions with rates in the **South (~2%)**, the **Northeast** and **Midwest (~3%)**, and the **West (~6%)**. Coronavirus 229E also remains elevated across regions in the most recent week **(Northeast 2.5%; Midwest 3.3%; South 2.0%; West 1.8%)**.
- Human Metapneumovirus (HMPV) activity continues to rise in the **South (up to 4.2%)** and **Midwest (up to 6.4%)** regions and has stabilized in the **Northeast (~5%)** and **West (~9%)**.
- Influenza B activity has **stabilized across the country**, with rates in the **West** and **Midwest ~5%** and rates in the **Northeast** and **South ~4%**.
- Influenza A H3 activity continues to **decline across the US**. Rates throughout all regions represent **~2%** or less of detection.

What this means for U.S. providers/labs:

- RSV activity remains high across all regions, which is **likely to translate into sustained clinical burden**, especially among infants, older adults, and patients with cardiopulmonary comorbidities.
- The continued dominance of HRV/EV throughout the country indicates that **non-influenza viral acute respiratory illness (ARI) remains common and may contribute to asthma and COPD exacerbations and ongoing urgent care and ED respiratory volume.**
- Persistent detections of the endemic coronaviruses, especially HKU1 and 229E, **add diagnostic complexity** during a period of mixed viral circulation and rates are **likely to remain elevated through early spring.**
- HMPV represents an important and sometimes underrecognized contributor to late-season respiratory disease. Nationally elevated rates and rising activity in the Midwest and West—suggests **HMPV may contribute meaningfully to pediatric and adult hospitalizations during a period when influenza A is waning.** HMPV can present with clinical features similar to RSV and influenza and impact infection control decisions, particularly in inpatient and pediatric settings.
- The stabilization of Influenza B across the country **reinforces the importance of maintaining attention to influenza broadly**—not only Influenza A H3—when evaluating patients with acute respiratory illness. The CDC recommends **prompt treatment for people who have flu or suspected flu and who are at increased risk of serious flu complications.**
  - Read more: Treating Flu with Antiviral Drugs

Gastrointestinal (GI)

What the data is showing us:

- *C. difficile* rates are **high in all regions**, with 12-week detection rate averages between **16 to 18%**. The **South** is the only region where the most recent week **(19.3%)** is higher than the 12-week average **(17.6%)**.
- Norovirus detections remain high as well, with 12-week averages between **14 to 16%**. All regions have **decreasing rates**, except for the **South**, where last week's detections **(15.2%)** were higher than the 12-week average **(14%).**
- *Campylobacter* detections in recent weeks are higher than 12-week averages, except for the **West** where 12-week average and the most recent week are **3.1%**. Detection rates are between **2% and 4%**.
- Rotavirus detections are **on the rise in every region**. The comparison between the previous week and the 12-week average are as follows: **North – 4.3% vs. 2.7%; South – 7.9% vs. 5.7%; West – 3.4% to 3%; Midwest – 5.3% to 3.3%.**

What this means for U.S. providers/labs:

- *C. difficile* remains high across all regions, but it's important to note that **a positive result does not indicate an active infection. A positive result could indicate colonization. Therefore, a positive result should be interpreted in conjunction with clinical symptoms and other relevant factors.**
  - Explore CDC data: NoroSTAT Data
- *Campylobacter* is typically **strongly correlated with the summer months.** This pathogen can be associated with **consumption of raw milk, undercooked poultry, and contaminated water.**
- Rotavirus can cause **severe GI distress in infants and children, particularly when there is low adoption of the vaccine. Peak rates occur in the winter and spring.**