U.S. Medical Affairs Gastrointestinal 2026 Trends Insights Report: 10/4/26-10/17/26

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What the data is showing us:

West

- **Norovirus** increased substantially from **8.0%** to **10.0%**, moving above its respective 12-week average.
- **Enteropathogenic *E. coli* (EPEC)** grew from **9.3%** to **11.0%**, also moving past its 12-week average.
- ***Campylobacter*** climbed from **4.2%** to **4.7%**, sitting above baseline.
- Several lower-prevalence pathogens also showed notable movement: **Shiga toxin-producing *E. coli* (STEC)** increased from **0.7%** to **1.7%**, moving slightly above its 12-week average of **1.6%**. **Sapovirus** grew from **0.7%** to **1.8%**, also exceeding baseline. ***Salmonella*** rose from **1.7%** to **2.8%**, returning to its 12-week average rather than exceeding it.

Midwest

- ***C. difficile*** increased from **14.8%** to **15.9%** and remained above its 12-week average of **14.0%**.
- **Norovirus** remained stable at **15.0%** and continued to exceed its 12-week average of **13.0%.**
- **EPEC** declined substantially from **11.3%** to **8.2%,** moving well below its 12-week average of **11.4%.**
- ***Campylobacter*** detections also declined from **4.2%** to **3.1%.**

South

- **Norovirus** increased modestly from **10.5%** to **10.9%** and remained above baseline.
- **EPEC** rose from **8.1%** to **9.3%** but continued to remain below its 12-week average of **10.8%**.
- ***Salmonella*** remained persistently elevated at approximately **5%**, although Week 2 activity of **5.5%** was essentially in line with its 12-week average of **5.6%.**
- **EAEC** increased from **2.3%** to **3.6%**, crossing into the report's high-activity category and exceeding its 12-week average of **3.3%.**
- **Sapovirus** remained elevated at **3.1%** versus a **2.1%** average.
- **Adenovirus F40/41** remained above baseline at **2.3%** versus **1.7%.**
- Outside the primary organism list, **Astrovirus** increased from **1.4%** to **1.8%** and was approximately twice its 12-week average of **0.9%**, making it another signal worth monitoring.

Northeast

- ***C. difficile*** declined from **16.5%** to **15.1%** but remained above baseline.
- **Norovirus** showed the clearest growth, rising from **9.2%** to **12.8%** and moving above its 12-week average of **11.0%.**
- **EPEC** was relatively stable and continued to run below its 12-week average.
- ***Campylobacter*** detections also increased from **4.9%** to **5.8%,** now meaningfully above its **4.5%** 12-week average.
- Several bacterial targets declined substantially: **Enterotoxigenic *E. coli* (ETEC)** fell from **4.1%** to **2.2%**, ***Salmonella*** from **3.9%** to **2.2%**, and **Enteroinvasive *E. coli* (EIEC**) from 2.4% to 1.0%. In contrast, **STEC** increased from **1.0%** to **1.4%**. Giardia remained elevated at **1.9%** in both weeks compared with a 12-week average of **1.2%**.

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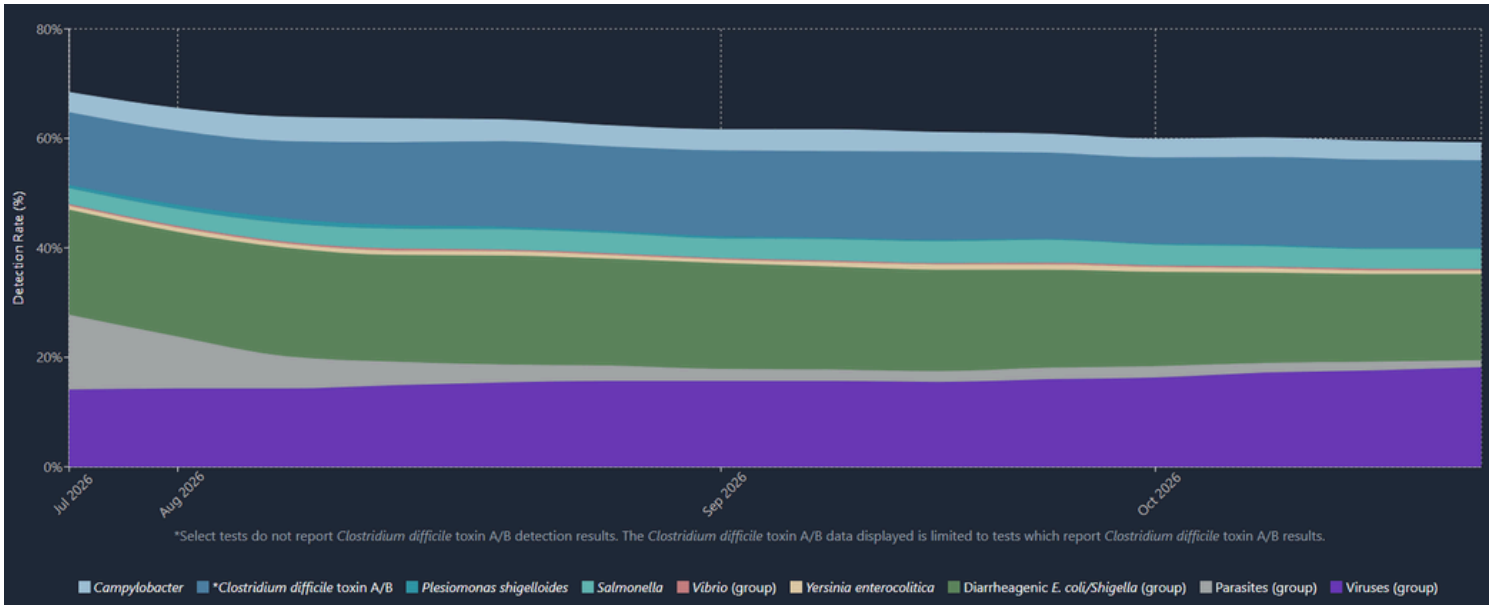
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What this means for U.S. providers/labs:

- Across all four regions, **Norovirus was above its 12-week average,** with the largest week-over-week increases occurring in the **Northeast** and **West.**
- **There is no single national pattern for the diarrheagenic *E. coli* targets.** EPEC declined sharply in the Midwest, remained below baseline in the Northeast and South, but increased above baseline in the West. EAEC increased notably in the South while remaining below its 12-week average in the other regions. ETEC declined substantially in the Northeast but remained slightly above baseline in the Midwest.
- **Sapovirus is worth watching across regions.** In the most recent week, detections exceeded the respective 12-week average in all four regions: South 3.1% versus 2.1%, West 1.8% versus 1.4%, Midwest 1.4% versus 0.9%, and Northeast 1.2% versus 1.0%. **The absolute rates remain regionally different, but the increasing trend is consistent.**
- ***Campylobacter* shows a split regional pattern.** Activity increased and moved above baseline in the Northeast and West, while it declined in the South and Midwest.

3-Month Detection Rate Breakdown:



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