

I am here today to present the 2026 Annual Threat Assessment, joined by the Directors of the CIA, DIA, FBI and NSA.

This briefing is being provided in accordance with ODNI's statutory responsibility and represents the Intelligence Community's assessment of the threats facing U.S. citizens, our Homeland, and our interests.

As President Trump's National Security Strategy highlights, America is blessed with an enviable geostrategic position, unparalleled assets, resources and a military second to none. Intelligence remains among our sharpest tools in protecting our interests and informing our policymakers and decisionmakers on key national security concerns.

In this assessment, we are following the structure of priorities laid out in the National Security Strategy, starting with threats to our Homeland, then shifting to global risks.

The defense of our Homeland is of utmost importance to the American people. Putting America first means committing to an unrelenting vigilance in service of our own citizens, borders, and communities. Recent efforts to bolster Homeland defense have yielded significantly positive results, but challenges persist.

For example, President Trump's strict enforcement of U.S. policies at the U.S. Mexico border and regionally has served as a deterrent and drastically reduced illegal immigration. Based on Customs and Border Patrol data, January 2026's monthly encounters are down 83.8% compared to January 2025. Encounters declined 79% compared to 2024.

The drivers of migration are likely to continue. Potential worsening instability in countries like Cuba and Haiti risk triggering migration surges. Smugglers who often operate as transnational criminal organizations view chaos as an opportunity for profit and will look to continue to profit from illegal immigration flows.

Transnational criminal organizations continue to pose a daily and direct threat to the health and safety of millions of U.S. citizens primarily by producing and trafficking in illegal drugs.

Under President Trump's leadership, fentanyl overdose deaths have seen a 30 percent decrease from September 2024 to September 2025.

Fentanyl potency has also decreased, likely due to disruptions to the production supply chain. U.S. efforts to work with China and India to halt the flow of fentanyl precursor chemicals to North America are demonstrating improvement, but there is more work to be done as there are still tens of thousands of fentanyl-related deaths in America every year.

President Trump's aggressive efforts to more directly and actively target TCOs and reduce the inflow of fentanyl precursors has already had a significant impact which is likely to continue.

Mexico-based TCOs like the Sinaloa Cartel and Jalisco New Generation Cartel dominate the production and smuggling of fentanyl, heroin, methamphetamine and cocaine into the United States.

Colombia-based TCOs and illegal armed groups like the Revolutionary Armed Forces of Columbia (FARC) and the National Liberation Army (ELN), are responsible for producing and trafficking large volumes of cocaine to the U.S. and European markets, with some indicators of attempts to expand to the Asia-Pacific region.

Colombia remains the world's largest producer of cocaine and Columbian criminal groups have expanded their trafficking relationships with neighboring Ecuadorian and Brazilian gangs.

MS-13 is well-established in cells in the U.S. and uses violence to intimidate the Salvadoran diaspora, engaging in murder, extortion, retail drug trafficking, firearms offenses and prostitution, fueling increased violence and instability.

These and other TCOs present a very tangible and individualized risk of violent crime to everyday Americans and contribute to regional instability.

They are likely to continue to respond to counterdrug pressure by accelerating adaptations in their operations, including shifting production locations and trafficking routes and methods.

The US continues to face a complex and evolving threat landscape with a geographically diverse set of Islamist terrorist actors seeking to propagate their ideology globally and harm Americans, even as Al-Qaeda and ISIS remain weaker than they were at their respective peaks.

The spread of Islamist ideology, in some cases led by individuals and organizations associated with the Muslim Brotherhood, poses a fundamental threat to freedom and foundational principles that underpin Western Civilization. Islamist groups and individuals use this ideology for recruiting and financial support for terrorist groups and individuals around the world, and to advance their political objectives of establishing an Islamist caliphate which governs based on Sharia. There are increasing examples of this in various European countries. President Trump's designation of certain Muslim Brotherhood chapters as Foreign Terrorist Organizations is a mechanism to secure Americans against this threat.

In response to setbacks to their capabilities of conducting large-scale complex attacks, Islamist terrorist groups have shifted toward focusing on executing information operations to spread propaganda and inspire or enable individuals located in or with access to the West.

U.S. counterterrorism operations primarily in Iraq, Somalia, Yemen and Syria in 2025 removed key terrorist leaders and operatives, degrading the ability of al-Qaeda and ISIS to quickly reconstitute its leadership and launch large-scale attacks against the Homeland and U.S. interests abroad.

Strict U.S. border enforcement measures and increased deportations of individuals with suspected links to Islamist terrorists have reduced access to the Homeland and removed some potential sources of future terror attacks.

Since January, US officials have only had a handful of encounters at our borders with individuals associated with terrorist groups. This is a positive trend, however our interagency coordinated efforts to identify, locate and remove known or suspected terrorists who are already in the U.S. continues with vigilance.

In 2025, there were at least three Islamist terrorist attacks in the US. Law enforcement disrupted at least 15 US based Islamist terrorist plotters. Roughly half of last year's disrupted plotters had some online contact with Islamist terrorists inspired by Islamist foreign terrorist organizations abroad. For example, in the recent attempt to attack a synagogue in Michigan, the shooter had familial ties to a Hizballah leader.

Al-Qaeda and ISIS pose the biggest threat to US interests overseas in parts of Africa, the Middle East and South Asia where these groups operate. They will continue to exploit political instability and ungoverned territory as they seek to rebuild their capabilities and leadership. Al-Qaeda probably has between 15,000-28,000 members worldwide, while ISIS likely has between 12,000 and 18,000 members. Africa has become a focal point for the global Sunni jihadist movement, where their largest and most violent affiliates and branches are active.

In the Middle East, AQAP in Yemen, ISIS-K in South Asia, and ISIS in Syria are among the most likely groups conducting external plotting. ISIS in Syria is likely seeking to rebuild its ranks, expand support networks and solicit funds by reengaging with and recruiting from the likely hundreds of ISIS detainees and thousands of ISIS-linked women and children who escaped or were released from prisons and displaced persons camps previously run by the Syrian Democratic Forces in northeast Syria.

Meanwhile, state actors present a risk broader in scope by seeking new capabilities in kinetic and cyber warfare.

The U.S. secure nuclear deterrent continues to ensure safety in the Homeland against strategic threats. However, Russia, China, North Korea, Iran and Pakistan have been researching and developing an array of novel, advanced, or traditional missile delivery systems with nuclear and conventional payloads, that put our Homeland within range. The IC assesses that threats to the Homeland will expand collectively to more than 16,000 missiles by 2035, from the current assessed figure of more than 3,000 missiles.

The IC assesses that China and Russia are developing advanced delivery systems meant to be capable of penetrating or bypassing U.S. missile defenses. North Korea's ICBMs can already reach U.S. soil, and it is committed to expanding its nuclear arsenal. Pakistan's long-range

ballistic missile development potentially could include ICBMs with the range capable of striking the Homeland. Iran has previously demonstrated space launch and other technology it could use to begin to develop a militarily viable ICBM before 2035, should Tehran attempt to pursue the capability. However, these assessments will be updated as the full impact of Operation Epic Fury's devastating strikes on Iran's missile production facilities, stockpiles, and launch capabilities is determined.

These nations will likely seek to understand US plans for advanced missile defense for the Homeland, probably for the purpose of shaping their own missile development programs and assessing US intentions regarding deterrence.

Shifting to the cyber domain, China, Russia, Iran, North Korea, and non-state ransomware groups will continue to seek to compromise U.S. government and private-sector networks as well as critical infrastructure to collect intelligence, create options for future disruption, and for financial gain. China and Russia present the most persistent and active threats and are continuing their R&D efforts. North Korea's cyber program is sophisticated and agile. In 2025 alone, North Korea's cryptocurrency heists probably stole \$2 billion which is helping to fund the regime, including further development of its strategic weapons programs.

Financially or ideologically motivated nonstate actors are becoming bolder, with ransomware groups shifting to faster, high-volume attacks that are harder to identify and mitigate.

Innovation in the field of Artificial Intelligence will likely accelerate the threats in the cyber domain. It will increasingly shape cyber operations with both cyber operators and defenders using these tools to improve their speed and effectiveness. For example, in August 2025, cyber actors used an AI tool to conduct a data-extortion operation against international government, healthcare and public health, emergency services sectors, and religious institutions.

In the Arctic, Russia, and to a lesser extent China, aim to strengthen their presence in the region through increased maritime trade, natural resource extraction, and military activity. Russia, which has the longest coastline in the Arctic, has long sought recognition of its 'Polar Great Power' status and is deploying more military forces and building new permanent infrastructure. China, though not an Arctic country, is engaged in more limited efforts in the region to advance its strategic and economic interests.

On the technology front, Artificial Intelligence capabilities are rapidly advancing and changing the threat landscape. As this is a defining technology that enables computers and machines to simulate human learning comprehension, problem solving, creativity, and autonomy, it will be critical to ensure that humans remain in control of how AI is used and of the machines that may threaten to autonomously violate the interests of the American people across all domains.

China is the most capable competitor in this field and aims to displace the U.S. as the global AI leader by 2030. Even if China does completely overtake the U.S., AI adoption at scale across the spectrum of usage poses risks. AI has the potential to aid in weapons and systems design and has been used in recent conflicts to influence targeting and streamline decision-making, underscoring the risk and likely threats that could manifest on the battlefield.

Early developers in quantum computers will give countries an extraordinary technological advantage over others to quickly process national security information and break current encryption methodology used to protect sensitive finance, health care and government information.

The global security landscape is volatile and complex, with armed conflict growing more common and posing potential threats against US interests. Strategic competition and regional and smaller powers becoming more willing to use force to pursue their interests heightens the risk of conflict. The space domain is becoming increasingly contested, with China and Russia developing counterspace capabilities to challenge US space efforts. The threat of nuclear proliferation and advancing chemical and biological warfare capabilities continues to grow.

In alignment with President Trump's National Security Strategy, this report will look at unique threats across major regions in the world, and how geography plays a role in how these threat vectors are prioritized.

Our focus turns to our neighborhood, the Western Hemisphere where flagging economies, high crime rates, pervasive organized crime, migration flows, corruption and narcotics trafficking present a spectrum of risks to US interests, and where strategic competitors seek greater influence in the region to challenge the US.

Latin America and the Caribbean almost certainly will see hotspots of volatility in the coming year, with the potential to undermine or distract some countries from improving living economies and living conditions and tackling illicit drug flows and cartels.

Since Maduro's arrest, we have seen a shift in Venezuela's leadership toward cooperating with the US to open its economy, develop the country's oil and gas extraction capability, and release political prisoners.

The US Mexico Canada agreement review in 2026 will likely increase uncertainty in many Latin American countries, especially those that rely on Mexico as an export destination for intermediate goods for manufacture and onward export to the U.S.

China, Russia and Iran are seeking to sustain economic, political and military engagement with Latin America. China's demand for raw materials is likely to drive continued economic outreach,

while Russia likely wants to expand its current security and diplomatic ties with Cuba and Nicaragua.

China aims to elevate its own political, economic, military and technological power to increase its own regional positioning, global influence, and to fend off threats to their interests. While there are challenging areas where interests diverge, President Trump's diplomatic engagements with President Xi have enabled progress on areas where there are mutual interests and opportunities for win-win outcomes.

China continues to rapidly modernize its military forces across all domains in pursuit of its goal to achieve "world-class" status by mid-century. This includes building a force with the aim of being capable of deterring and disrupting U.S. and allied forces in its region, and developing the ability to seize Taiwan by force, if necessary. However, the IC assesses that China will likely seek to set the conditions for an eventual peaceful reunification with Taiwan, short of conflict.

An increasingly confident North Korean regime remains a source of concern regionally and globally. Its WMD, conventional military capabilities, illicit cyber activities and demonstrated willingness to use asymmetric capabilities poses a threat to the US and its allies, particularly South Korea and Japan.

North Korea's partnership with Russia is growing and in 2025, Kim took steps to improve ties with China, still North Korea's most important trading partner and economic benefactor, after the relationship had cooled due to Beijing's earlier opposition to Pyongyang's nuclear and missile tests.

The benefits North Korea receives for its support for Russia in the war against Ukraine have increased North Korean capabilities as their forces have gained combat experience in 21<sup>st</sup> century warfare along with equipment. In 2024, North Korea deployed more than 11,000 troops to Russia to support combat operations in Kursk.

Pyongyang continues to develop and expand its strategic weapons programs, including missiles that can evade US and regional missile defenses, and continuing to work to increase its nuclear warhead stockpile. It maintains biological and chemical weapons capabilities which it might use during a conflict or in an unconventional or clandestine attack.

Russia retains the capability to selectively challenge U.S. interests globally by military and non-military means. The most dangerous threat posed by Russia to the US is an escalatory spiral in an ongoing conflict such as Ukraine or a new conflict that led to direct hostilities including the deployment of nuclear weapons.

Putin continues to invest in Russia's defense industrial base and investment in novel capabilities poses more of a threat to the US homeland and forces abroad than his country's conventional

weapons. Russia has advanced systems, including counterspace weapons, hypersonic missiles and undersea capabilities designed to negate U.S. military advantage.

Moscow also relies on other tools to exert pressure using grayzone tactics to further its goals and compete below the level of armed conflict.

Russia is also building extensive counterspace capabilities to contest US space dominance. Its development of a nuclear counterspace weapon poses the greatest single threat to the world's space architecture.

During the past year, Russia has maintained the upper hand in its war against Ukraine. US-led negotiations between Moscow and Kyiv are ongoing. Until such an agreement is met, Moscow is likely to continue fighting a war of attrition with the aim of degrading Kyiv's ability and will to resist.

In the Middle East, conflict and instability will shape security, political and economic dynamics in a variety of ways. The US led Operation Epic Fury is advancing fundamental change in the region that began with Hamas's attack on Israel on October 7, 2023 and continued with the 12-Day War last year, resulting in weakening Iran and its proxies.

The regime in Iran appears to be intact but largely degraded by Operation Epic Fury. Its regional power projection capabilities have been destroyed, leaving limited options. Prior to the current operations, Iran's strategic position had been significantly degraded. The US led maximum pressure campaign and snapback of European sanctions added additional pressure to an already bleak Iranian economy, resulting in mass protests earlier this year that Tehran suppressed by killing thousands of protesters. Even if the regime remains intact, internal tensions are likely to increase as Iran's economy worsens.

Even so, Iran and its proxies remain capable of and continue to attack US and allied interests in the Middle East. If a hostile regime survives, it will seek to begin a yearslong effort to rebuild its missiles and UAV forces.

As a result of Operation Midnight Hammer, Iran's nuclear enrichment program was obliterated. There has been no efforts since then to try to rebuild their enrichment capability. The entrances to the underground facilities that were bombed have been buried and shuttered with cement. We continue to monitor for any early indicators on what position the current or any new leadership in Iran will take with regard to authorizing a nuclear weapons program.

China, Russia and North Korea see the United States as a strategic competitor and potential adversary. Iran has long viewed the U.S. as an adversary and is engaged in active conflict with the U.S. as of this writing.

These four countries are likely to continue their selective cooperation with each other, which could bolster their individual capabilities and threats to U.S. interests more broadly. However, currently, these relationships are primarily bilateral on selective issues, and depend on broader circumstances, divergent sovereign interests, and in some cases, concerns over directly confronting the U.S. These factors are likely to constrain their relationships.

For example, during the 12 Day War last summer, and the current Operation Epic Fury, Iran assumed that Russia, China and North Korea would provide support to Iran, and has been frustrated in both cases that that support has been very limited to non-existent.

Finally, African governments will use their wealth in critical minerals to seek partnerships that deliver them meaningful benefit. Concurrent conflicts and crises across the continent will continue to put US citizens at risk and cause further instability. Infectious diseases endemic to Africa continue to crop up in new regions and threaten to spill over.

Africa has increasingly become a focal point for the global Sunni jihadist movement. Al Shabaab has encroached on Mogadishu, Somalia, during the past year, and continues to coordinate funding and propaganda campaigns with other parts of Al Qaeda in Yemen.

ISIS in West Africa and the Sahel have increased the intensity of their attacks against local security forces, expanding their areas of operation, moving closer to cities with a US presence.

In closing, as leaders of the Intelligence Community, we are committed to providing the President, Congress, policymakers and operators with timely, unbiased, relevant intelligence to ensure the safety, security and freedom of the American people.

Thank you.