THE PIMA FIELD & MARKET JOURNAL

EST. 2018

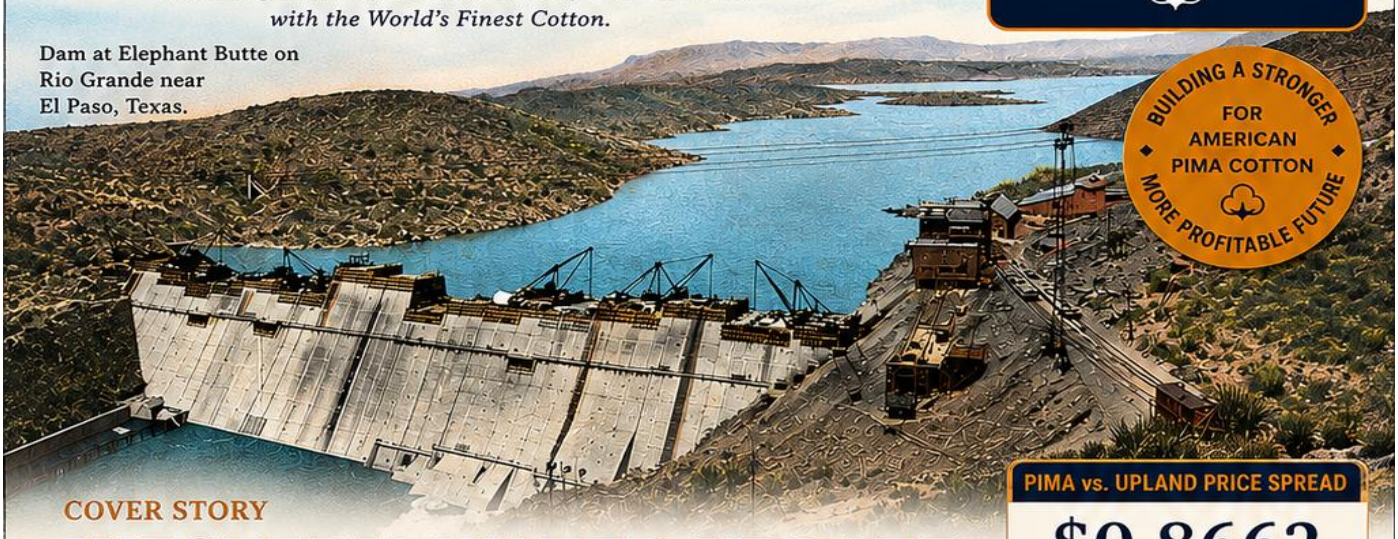
PIMA GROWERS

AMERICA'S FINEST COTTON

Connecting Growers, Markets, Industry and Consumers with the World's Finest Cotton.

WEEK ENDING
AUGUST 7, 2026

VOL. 8 ◆ ISSUE 52



Dam at Elephant Butte on Rio Grande near El Paso, Texas.

BUILDING A STRONGER FOR AMERICAN PIMA COTTON MORE PROFITABLE FUTURE

COVER STORY

WESTERN WATER UPDATE

Reservoir Levels, River Flows and Implications for Pima Cotton Production

An in-depth look at current water conditions across the Colorado River Basin and Rio Grande Basin, including reservoir storage, runoff, and outlooks that matter most to Pima growers.

SEE PAGES 5–6

PIMA vs. UPLAND PRICE SPREAD

$0.8662
PER POUND

PIMA SPOT PRICE	$1.71 /lb
UPLAND SPOT PRICE	$0.8438 /lb

PIMA PREMIUM OVER UPLAND
102.8%

Premium Pima price advantage remains strong and well above the 5-year average spread of $0.8200 per pound.
Source: Trading Economics, 8-7-26

496.5K
EXPORT COMMITMENTS
+6.5% YOY
(LY 465.4K RB)

+$0.8662/LB
PREMIUM OVER UPLAND COTTON
VS. 5-YEAR AVG. +$0.8200

CROP IN PEAK BLOOM CUTOUT APPROACHING
NEXT 7–14 DAYS
MANAGE HEAT, WATER & NUTRITION CRITICAL

FEATURED IN THIS ISSUE



WESTERN WATER & RESERVOIR INTELLIGENCE
Colorado River & Rio Grande Basin updates, reservoir storage, runoff and outlooks.
PAGES 5–6



STATE OF AMERICAN PIMA DASHBOARD
Commitments surge, shipments strong, forward book tops 101.5K bales.
PAGE 8



GLOBAL MARKET INTELLIGENCE DASHBOARD
Key global market indicators and demand signals at a glance.
PAGE 11



COTTON THERMAL STRESS SUMMARY
Hot temperatures now impact boll fill, fiber quality and yield potential.
PAGE 17



IRRIGATION INTELLIGENCE & CROP WATER USE
Water demand peaks during bloom; efficient irrigation protects yield and quality.
PAGE 18



BEYOND FIBER: THE FUTURE OF PREMIUM COTTON
Creating value through sustainability, innovation, traceability, and differentiation.
PAGES 22–27

THIS WEEK

40 PAGES OF INSIGHT
12 EXECUTIVE DASHBOARDS
10 ORIGINAL RESEARCH ARTICLES
WEEKLY MARKET INTELLIGENCE
CROP & WEATHER UPDATES

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON



BUILDING THE AMERICAN PIMA COTTON ECOSYSTEM

Connecting Growers, Markets, Industry and Consumers Through the World's Finest Cotton.

The Pima Cotton Improvement Association (PCIA) is a nonprofit organization dedicated to advancing the production, profitability, and promotion of American-grown Pima cotton.

Through its grower outreach and industry communications platform, *Pima Growers*, PCIA connects growers, markets, industry partners, and consumers while supporting research, education, market development, and supply chain collaboration across the American Pima cotton industry.

EXECUTIVE FIELD SUMMARY

American Pima development continues to outpace historical averages. California remains the strongest-performing production region with excellent crop uniformity and accelerating boll development. Arizona is entering peak boll set and will require careful irrigation management over the next two weeks.

Texas recorded the largest week-over-week gain in squaring, though variability from rainfall and heat stress remains elevated. U.S. cotton condition improved to 45 percent Good to Excellent, but American Pima production continues to perform at a wide margin above the national crop.

The American Pima ecosystem depends on collaboration across growers, gins, merchants, brands, and consumers. PCIA and Pima Growers remain committed to delivering impartial field intelligence, market insight, and industry leadership that strengthen the long-term future of Pima cotton.

WHO WE ARE

Pima Cotton Improvement Association (PCIA)

Founded in 2018, PCIA serves American Pima cotton producers through research, education, variety evaluation, industry collaboration, and production improvement initiatives.

Pima Growers

Pima Growers is the grower and industry communications platform of PCIA, providing market intelligence, production updates, educational resources, and Field-to-Fiber storytelling that connects the American Pima cotton supply chain.

WHY WE EXIST

American Pima cotton represents one of the world's most exceptional natural fibers. Our mission is to first give Pima growers timely information and research, then connect upstream value chain partners through a transparent, profitable, and sustainable American Pima cotton ecosystem.

THE PIMA COTTON ECOSYSTEM

GROWERS
Producing the World's Finest Cotton

↓

PIMA GROWERS
Connecting & Advancing the Industry

↓

INDUSTRY
Gins, Merchants, Suppliers & Partners

↓

BRANDS
Creating Premium Pima Cotton Products

↓

CONSUMERS
Demanding Quality, Sustainability & Trust

↓

RESEARCH & INNOVATION
Investing in the Future of Pima Cotton

BUILDING A STRONGER, MORE PROFITABLE FUTURE FOR AMERICAN PIMA COTTON.

WHAT WE DO

Market Intelligence
Deliver timely insights and market information across the American Pima cotton supply chain.

Production Research & Agronomic Education
Support growers through research, field trials, and educational resources that improve productivity, quality, and profitability.

Industry Promotion & Consumer Awareness
Promote the value, performance, and heritage of American-grown Pima cotton.

Supply Chain Development
Strengthen relationships from field to fiber to finished product through transparency, traceability, and collaboration.

Sponsorship & Partnership Programs
Develop strategic partnerships that invest in the future of American Pima cotton.

Field-to-Fiber Ecosystem Development
Connect growers, industry, brands, retailers, and consumers through innovation, education, and storytelling.

CONNECT WITH PIMA GROWERS

MEMBERSHIP
- Individual Partner
- Small Business Partner
- Corporate Partner

Join our mission to advance American Pima cotton.

ADVERTISING & PARTNERSHIPS
- Journal Sponsorships
- Feature Articles
- Industry Partner Pages

Reach growers, gins, merchants, brands, and industry leaders.

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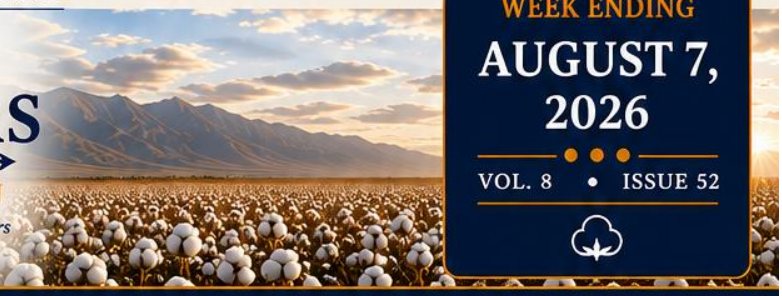
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THE PIMA PERSPECTIVE

American Pima's Advantage Depends on Protecting Value

By Rick Neuenschwander

CEO | Pima Cotton Improvement Association (PCIA) • Pima Growers

The American Pima crop remains in peak bloom across all growing regions. Arizona is in peak bloom and approaching cutout. In West Texas, much of the crop is in peak bloom with cutout expected in the next 10–14 days. Managing heat, irrigation, nutrition and fruit retention during this critical transition will determine fiber quality, yield and the premium value Pima growers deliver to the world.

The 2026 marketing year is now complete. MY 2025/26 closed with 496.5 thousand running bales of commitments—up 6.5% over last year. The new crop year begins with 158.8 thousand RB already on the books, providing a strong foundation to build from.

Net sales this week totaled -0.4K RB, reflecting a 3.1K RB buy-back in the final week. Exports for the week were 5.0K RB, and 90.1% of commitments were shipped by year-end, underscoring efficient supply chains and strong global demand.

Across the Southwest, crop development is on track. California remains exceptionally uniform. Arizona is in peak bloom and approaching cutout. West Texas is in peak bloom to cutout in the next 10–14 days. Protecting yield, fiber quality and our premium price advantage depends on disciplined management during this window.

American Pima's premium over upland is $0.8662 per pound, more than the five-year average of $0.8200. That advantage exists because of the discipline and stewardship that growers deliver every day in the field.

When we protect our crop, we protect our value. When we protect our value, we secure our future.

496.5K
EXPORT COMMITMENTS
+6.5% YOY
(LY 465.4K RB)

+$0.8662/LB
PREMIUM OVER UPLAND COTTON
VS. 5-YEAR AVG. +$0.8200

CROP IN PEAK BLOOM CUTOUT APPROACHING
NEXT 7–14 DAYS
MANAGE HEAT, WATER & NUTRITION CRITICAL

1 EXECUTE CUTOUT

- Protect remaining squares and young bolls
- Manage heat stress and irrigation closely
- Maintain NAWF targets as plant demand shifts
- Maximize boll retention and fiber quality

Careful management now secures yield and quality.

2 STRENGTHENING MARKET FUNDAMENTALS

- Commitments closed at 496.5K RB (+6.5% YoY)
- Exports for the week totaled 5.0K RB
- 90.1% of commitments shipped to date
- 8.1K RB unshipped carries into MY 26/27

Strong fundamentals create opportunity for growers.

3 GROWING CONSUMER VALUE

- Traceability gaining importance
- Premium brands expanding
- Quality remains differentiated
- Consumer education builds demand

The story we tell today creates value tomorrow.

4 EXPANDING GLOBAL OPPORTUNITY

- MY 26/27 forward book stands at 109.7K RB
- 158.8K RB on the books (forward + carryover)
- Export demand remains healthy
- Long-term market development continues

Global demand for premium cotton continues to grow.

PIMA GROWERS INSIGHT

American Pima's competitive advantage is built on four connected priorities:

- Producing exceptional fiber quality
- Executing precision crop management during peak bloom to cutout
- Delivering trusted, traceable supply chains
- Expanding consumer demand through education and premium branding

The strongest future for American Pima will be built by connecting production excellence with market leadership.

LOOKING AHEAD

Over the next month, the industry's attention shifts to finishing the crop and protecting fiber quality.

Every irrigation decision, every boll retained, every pound of premium fiber harvested contributes to maintaining American Pima's global leadership.

At the same time, premium pricing alone is not enough. Long-term success depends upon growing consumer demand, strengthening relationships throughout the textile supply chain, and continuing to communicate why American-grown Pima remains the world's benchmark for premium cotton.

American Pima has never competed on volume.
It competes on quality, authenticity, trust and value—
and those advantages have never been more relevant.

That mission remains at the heart of Pima Growers.

Rick Neuenschwander

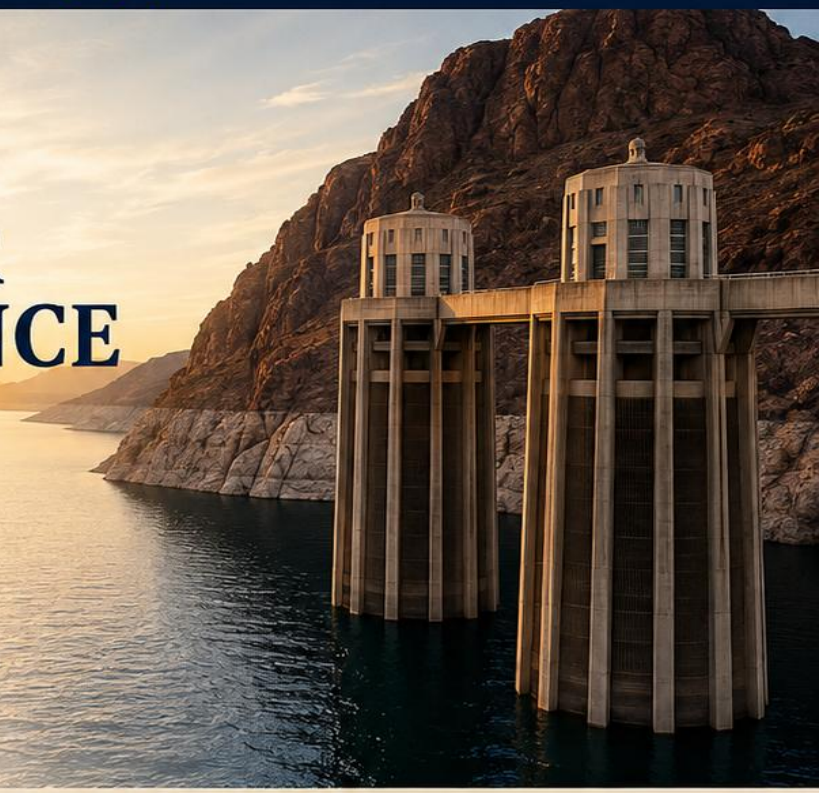
Rick Neuenschwander
CEO, Pima Cotton Improvement Association (PCIA)
Pima Growers



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AUGUST-2026

WESTERN WATER & RESERVOIR INTELLIGENCE

Critical water supply and allocation updates for the American Pima belt.



Water supplies across the western U.S. remain under severe stress. Colorado River system storage stands at 31.7% of total capacity, driven by critically low levels in Lakes Mead (26.9%) and Powell (23.0%). In Arizona, total system storage is 49% of capacity with declines continuing across all major reservoirs. In the Rio Grande Basin, surface reservoirs are at critical lows, triggering zero-allocation conditions in many districts and forcing reliance on brackish groundwater.

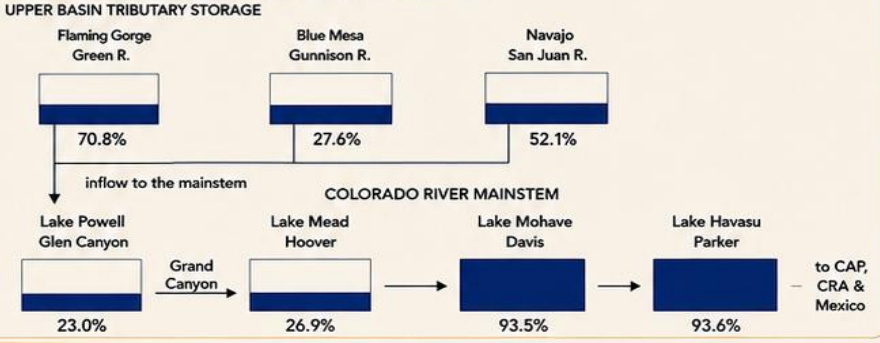
EXECUTIVE SUMMARY

- Colorado River system reservoirs hold 18.42 million acre-feet — 31.7% of their combined 58.15 million acre-foot capacity.
- Lake Mead (26.9% full) and Lake Powell (23.0% full) together hold 12.37 million acre-feet — 25.0% of their combined capacity.
- System storage has changed –3.84 million acre-feet over the past year.
- For calendar year 2026, a Level 1 Shortage Condition (2007 Interim Guidelines Section 2.D.1.a) plus DCP contributions govern Lake Mead operations.

KEY SYSTEM METRICS (As of August 5, 2026)

TOTAL SYSTEM STORAGE (7 RESERVOIRS)	MEAD + POWELL COMBINED STORAGE	CHANGE IN STORAGE (PAST YEAR)	2026 OPERATIONS
18.42 MILLION ACRE-FEET	**12.37** MILLION ACRE-FEET	**-3.84** MILLION ACRE-FEET	LEVEL 1 SHORTAGE + DCP CONTRIBUTIONS
31.7% OF CAPACITY	25.0% OF CAPACITY		2007 Interim Guidelines Section 2.D.1.a

COLORADO RIVER SYSTEM FLOW DIAGRAM



WHY IT MATTERS

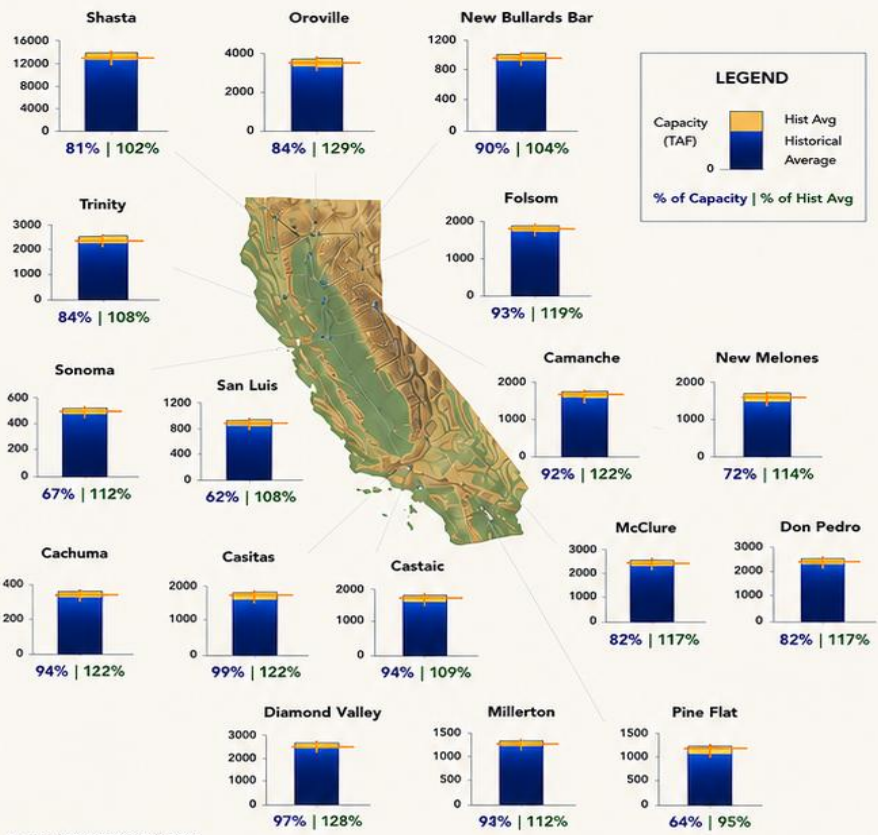
Reservoir storage levels directly impact water allocations, irrigation reliability, and long-term planning across the American Pima belt. Continued monitoring and adaptive management will be essential as we move deeper into the irrigation season.

STAY INFORMED.
PLAN AHEAD.
PROTECT OUR WATER FUTURE.

CALIFORNIA MAJOR WATER SUPPLY RESERVOIRS

CURRENT CONDITIONS

Midnight – August 6, 2026



Updated 08/07/2026 12:16 PM

Source: California Department of Water Resources



Efficient irrigation management is essential as water supplies tighten across the West.



Irrigation water delivered through a district turnout in the Lower Rio Grande Valley.

RIO GRANDE BASIN HYDROLOGICAL REPORT

1. SYSTEM CAPACITY & RESERVOIR STATUS

The monitored water supply reservoirs across the Rio Grande Basin are at a combined 33.4% of total capacity. A multi-year drought and severely depleted snowpacks have driven surface water storage to critical minimums.

- **Elephant Butte (Upper Basin):** 1.4% full (~27,000 acre-feet). Summer agricultural releases have officially concluded.
- **Amistad Reservoir (Mid-Basin):** 38.5% full (Texas Share). Currently sitting at 1,056.91 feet, ~60 feet below the normal conservation pool.
- **Falcon Lake (Lower Basin):** 26.1% full (Texas Share). Currently sitting at 264.57 feet, severely limiting supply to the Lower Rio Grande Valley.
- **Red Bluff Reservoir (Pecos Tributary):** 47.8% full (69,428 acre-feet). Experiencing steady, multi-year declines.

2. SURFACE WATER ALLOCATION NESTRICTIONS

The Texas Commission on Environmental Quality (TCEQ) Rio Grande Watermaster Program enforces a strict Domestic, Municipal, and Industrial (DMI) priority system. Cities and industrial users are guaranteed their water allocations first, shifting the entirety of basin shortages onto agricultural accounts.

- **Zero-Allocation Status:** Multiple irrigation districts in the Lower Rio Grande Valley have completely exhausted their surface water accounts. No new agricultural allocations are being issued until reservoir levels recover.
- **The 57/43 Supreme Court Split:** Under the federal Rio Grande Settlement, a rigid 57% (NM) to 43% (TX) irrigation water-sharing split is enforced at the El Paso gauge.
- **Mandatory Pumping Cuts:** To protect downstream surface flows, New Mexico must legally reduce its annual groundwater depletions by 18,200 acre-feet over the next decade, forcing the aggressive retirement of agricultural water rights in the Mesilla Valley.

3. GROUNDWATER QUALITY & SALINITY HAZARDS

With surface water largely unavailable, producers are forced to rely heavily on underlying aquifers. This groundwater carries severe geological and agricultural constraints, including high salinity and soil sodicity risks.

- **The 1,000 PPM Salinity Threshold:** Fresh groundwater is highly restricted. Wells in the El Paso Valley and down into the Lower Rio Grande Valley regularly exceed 1,000 to 3,000+ parts per million (ppm) of Total Dissolved Solids (TDS), classifying them as brackish.
- **Soil Sodicity and Dispersion:** High concentrations of sodium (Na^+), chloride (Cl^-), and sulfates (SO_4^{2-}) cause irrigation-induced dispersion. Continuous use without freshwater flushing destroys low-permeability clay soil structure, locking out crop root infiltration.
- **Depth and Proximity Constraints:** In the Lower Valley, usable agricultural groundwater is restricted to the shallow Rio Grande alluvium at depths under 75 feet directly adjacent to the riverbed. Pumping farther than a few miles from the river or drilling deeper than 100–300 feet yields highly mineralized water unfit for crops.

For full details on the Rio Grande Basin report, see Page 2.

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MARKET INTELLIGENCE

PRICES
Tracking market movements that impact value.

TRENDS
Identifying patterns shaping today and tomorrow.

INSIGHTS
Delivering knowledge that drives confident decisions.

OPPORTUNITIES
Spotting potential and creating paths for growth.

STEWARDS OF THE LAND.
PRODUCERS OF THE WORLD'S FINEST COTTON.

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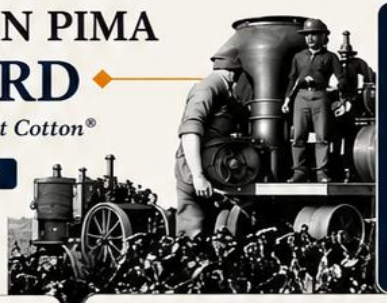
AMERICA'S FINEST COTTON

STATE OF AMERICAN PIMA DASHBOARD

Market Intelligence for the World's Finest Cotton®

PUBLISHED BY PCIA ◆ PRESENTED BY PIMA GROWERS

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WEEK ENDING AUG. 7TH, 2026

VOL. 8 ◆ ISSUE S2

AMERICAN PIMA COTTON THE WORLD'S FINEST COTTON®

EXECUTIVE SUMMARY

Total commitments stand at 496.5k bales, up 6.5% YoY vs last week and ahead of the same week last year by 30.5k.

Weekly exports totaled 5.0k bales, while forward sales softened, with net new sales of –0.4k bales.

Premium vs. upland is +$0.8662/lb., well above the 5-year average.

Ending stocks are estimated at 87,000 bales as of July 11, 2026, reflecting continued tightening of available American Pima supplies.

Market fundamentals remain favorable for American Pima.

- Total commitments stand at 496.5k bales, up 6.5% YoY vs last week and ahead of the same week last year by 30.5k.
- Premium vs. upland is +$0.8662/lb., well above the 5-year average.
- Ending stocks are estimated at 87,000 bales as of July 11, 2026.
- Market fundamentals remain favorable for American Pima.

OVERALL CONDITION



Export demand remains strong despite slower weekly shipments. Forward buying continues to improve while historically tight supplies support premium pricing.

MARKET SNAPSHOT

Pima Current Landed Southeast Asia	$1.86 US
Pima Current-Spot Price	$1.71 US
Pima Current-Organic Trading	$2.30 US
ELS Current- Giza 94 Landed Southeast Asia	$1.50 Egypt
ELS Current- Israel Landed Southeast Asia	$1.85 Israel
Xinjiang Long Staple Type 137	$1.81 China
US Pima- Prior 5-year avg. Spot Price	$1.65
Upland Current- Spot Price	$.8438
Upland-Prior 5-year avg. Spot Price	$.8300
Pima/Upland Prior 5-year avg. price spread	$.8200
Pima/Upland current price spread	$.8662
Oil (WTI)	$77.080
PSF	$.50

PIMA MONITOR

Pima- 2026 acreage projection- 150,000.
2025 acreage 142,000.
2024 Acreage actual USDA 200,500.

Pima- 2026 projection at 375,000 bales,
2025 at 388,000 bales,
2024 at 471,000 bales

Pima- 2024/25 Ending Stocks est.
87,000 bales as of 7-11-26

USDA Weekly Export Sales Report,

- https://apps.fas.usda.gov/esrqs/#/esr-query
- https://apps.fas.usda.gov/esrqs/#/reports/bellreport
- https://www.sunsirs.com/uk/prodetail-976.html
- https://tradingeconomics.com/commodities

STATE SCORECARD

CATEGORY	OUTLOOK	COMMENTARY
Supply Fundamentals	● STRONG	Lower acreage, higher projected production, and historically low ending stocks support favorable premium fundamentals.
Demand Outlook	● STRONG	Export commitments remain ahead of last year with new business supporting forward demand.
Premium Environment	● FAVORABLE	Premiums remain near long-term averages, reflecting the superior quality and value of American Pima.
Market Sentiment	● POSITIVE	Buyers remain engaged and the supply outlook supports continued long-term confidence.
Policy & Stewardship	● STRONG	Traceability, domestic manufacturing, and sustainability initiatives strengthen competitive advantage.

SUPPLY SNAPSHOT

U.S. PIMA COTTON

METRIC	2024	2025 (EST.)	2026 (EST.)
Acreage (Acres)	200,500	142,000	150,000
Production (Bales)	471,000	388,000	375,000
Ending Stocks (Est.)	140,000	113,000	87,000

Source: USDA FAS, PCIA Estimates
Ending stocks estimate as of July 11, 2026.

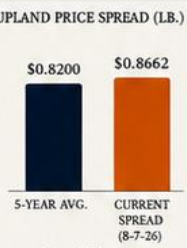
DEMAND SNAPSHOT

EXPORT COMMITMENTS ('000 RB)

METRIC	CURRENT	LAST WEEK	WoW CHANGE
Total Commitments	496.5K	494.1K	+2.4K
New Sales (WoW)	–0.4K	4.5K	–4.9K
Weekly Exports	5.0K	4.5K	+0.5K
Top Destination	India	India	—

Source: USDA FAS Export Sales Report • Data as of Aug. 7, 2026.

PIMA/UPLAND PRICE SPREAD (LB.)

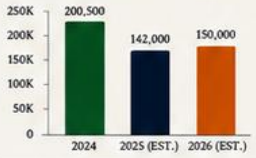


Current spread is well above the 5-year average.



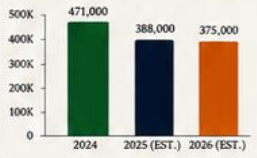
ACREAGE TREND

U.S. PIMA COTTON ACRES — ↓ –25.2% VS 2024



PRODUCTION TREND

U.S. PIMA COTTON (BALES) — ↓ –20.4% VS 2024



EXPORT COMMITMENTS TREND

AMERICAN PIMA COTTON ('000 RB) RUNNING BALES) +6.5% VS Prior Week



PIMA MONITOR (SUPPLY OUTLOOK)

PIMA COTTON SUPPLY SNAPSHOT

- Pima – 2026 acreage projection: 150,000 acres
- 2025 acreage: 142,000 acres
- 2024 acreage (actual USDA): 200,500 acres
- Pima – 2026 production: 375,000 bales
- 2025 production: 388,000 bales
- 2024 production: 471,000 bales
- 2024/25 Ending Stocks est.: 87,000 bales
- Commodity Prices: Trading Economics

USDA

USDA EXPORT SALES – AMERICAN PIMA COTTON WEEKLY EXPORT SUMMARY REPORT

For the week ending Aug. 7, 2026, and shipments through Aug. 7, 2026.

- Net sales of –0.4K bales.
- 2026/27 forward sales of 8.1K bales.
- Weekly exports of 5.0K bales (down 0.0% vs last week).
- Total commitments reached 496.5K bales.
- Commitments are up 6.5% vs last week and ahead of last year by 30.5K.

Source: USDA FAS Export Sales Report
Data as of Aug. 7, 2026.

NET SALES BY DESTINATION (CURRENT WEEK)

India	– 0.2K
Pakistan	– 0.2K
Bangladesh	– 0.0K
All Other	—
TOTAL	–0.4K

EXPORTS BY DESTINATION (CURRENT WEEK)

India	2.5K
Thailand	1.6K
All Other	0.9K
TOTAL	5.0K

FORWARD BOOK MONITOR (RUNNING BALES)

Forward Book	109.7K
WoW Change	+8.1K (+8.0% WoW)
% of Current MY Sales	22.1%

WHAT WE ARE WATCHING

- Reduced acreage limits supply.
- Production forecast reduced to 375,000 bales.
- Tight supply outlook continues.
- Export commitments ahead of last year.
- Premium trend near 5-year average.
- Traceability and domestic manufacturing strengthen U.S. market leadership.

RISKS TO WATCH

- Global textile demand uneven.
- Weather unpredictability.
- China market softness.
- Trade policy uncertainty.
- Higher input and transportation costs.

PIMA GROWERS OUTLOOK

The State of American Pima remains favorable, with strong export demand and historically low ending stocks creating a tight premium supply in a highly sought market. With higher production forecast by stable demand and low ending stock, American Pima's competitive position, visible price premium, and long-term fundamentals remain strong.

EST. 2018

PIMA GROWERS.

AMERICA'S FINEST COTTON

STATE OF AMERICAN PIMA
FIBER VALUE DASHBOARD

BENCHMARKING AMERICAN PIMA AGAINST COMPETING FIBERS

Tracking fiber values, premiuns and market relationships to measure American Pima's competitive advantage

PUBLISHED BY PCIA ◆ PRESENTED BY PIMA GROWERS

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WEEK ENDING AUG. 7TH, 2026

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Xinjiang Long Staple Type 137	$1.81 China
US Pima- Prior 5-year avg. Spot Price	$1.65
Upland Current- Spot Price	$0.8438
Upland-Prior 5-year avg. Spot Price	$0.8300
Pima/Upland Prior 5-year avg. price spread	$0.8200
Pima/Upland current price spread	$0.8662
Oil (WTI)	$77.080
PSF (Polyester Staple Fiber)	$0.50

Source: ICE Futures, USDA, PCIA, SunSirs, Trading Economics
Data as of Aug. 7, 2026

ELS LANDED SE ASIA PRICE COMPARISON

Current Market Prices (USD per lb)

ISRAEL ELS LANDED	$1.85
GIZA 94 LANDED	$1.50
AMERICAN PIMA LANDED	$1.86
XINJIANG LONG STAPLE TYPE 137	$1.81

AMERICAN PIMA TRADES AT A PREMIUM OF

+$0.8662/LB

OVER COMMODITY UPLAND COTTON

($1.71 – $0.8438 PER LB)

RELATED FIBER & COMMODITY MARKETS

COMMODITY	CURRENT	WOW CHANGE	TREND
COTTON (CTZ26) *ICE Futures*	$0.8438	+3.35%	↑
POLYESTER STAPLE FIBER (PSF) *SunSirs*	$0.50	-2.00%	↓
WTI CRUDE OIL NYMEX	$77.080	-11.20%	↓

Energy costs continue to influence global fiber and textile production economics.

LONG STAPLE PREMIUM RATIO BENCHMARK

BENCHMARK	RATIO
CURRENT	203%
5-YEAR AVERAGE	208%
RECENT NORMAL RANGE	135% – 140%



LONG STAPLE PREMIUM RATIO GUIDE

RATIO	PREMIUM ABOVE UPLAND
140% and above	+40% and above
120% - 140%	+20% to +40%
Below 120%	Below +20%

The Long Staple Premium Ratio measures the premium of American Pima over commodity upland cotton. Higher ratios reflect stronger demand for premium long staple fiber.

PIMA MONITOR (PIMA SUPPLY OUTLOOK)

- Pima- 2026 acreage projection- 150,000. 2025 acreage 142,000. 2024 Acreage actual USDA 200,500.
- Pima- 2026 projection at 375,000 bales, 2025 at 388,000 bales, 2024 at 471,000 bales
- Pima- 2024/25 Ending Stocks est. 87,000 bales as of 7-11-26

Source: USDA WASDE & PCIA

ACREAGE & PRODUCTION CHANGE

2024 → 2026 CHANGE

ACREAGE	PRODUCTION
↓ -25.2%	↓ -20.4%

Declining acreage and production continue to support strong premium fundamentals.

PREMIUM TAKEAWAY

The strongest development this week was continued forward buying for the 2026/27 crop, pushing the forward book above 100,000 bales.

Combined with historically tight supply and 87,000 bale ending stocks, American Pima fundamentals remain constructive.

AMERICAN PIMA FIBER VALUE SIGNAL



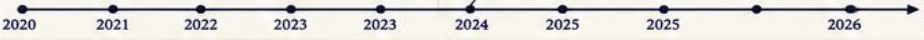
The Long Staple Premium Ratio of 203%, maintains the five-year average of 208%, reflecting continued strength in American Pima's premium value proposition. Acreage is aligned to decline 25% and production -20.4% from 2024 to 2026, tightening available supply and reinforcing long-term premium fundamentals.

RATIO INTERPRETATION

GREEN	> 140%	Strong Premium Environment
GOLD	120% - 140%	Normal Premium Environment
RED	< 120%	Value Premium Environment

5-YEAR AVERAGE: 208% RECENT NORMAL RANGE: 135% - 140%

HISTORICAL PIMA/UPLAND SPREAD (USD PER LB) - 5-YEAR TREND



FORWARD BOOK MONITOR (2026/27 CROP)

109.7K BALES

+8.3K BALES WoW

(+8.2% WoW)

CURRENT SPREAD

$0.8662

5-YEAR AVERAGE

$0.8200

USDA WEEKLY EXPORT SALES REPORT WEEK 52 - ENDING JULY 30, 2026

- Net sales of -0.4k bales.
- 2026/27 forward sales of 5.0k bales.
- Weekly exports of 5.0k bales (down 0.0% vs last week).
- Total commitments reached 496.5k bales.
- Commitments are up 6.5% vs last week and ahead of last year by 30.5k.

Source: USDA FAS Export Sales Report
Data as of July 30, 2026.

NET SALES BY DESTINATION (CURRENT WEEK)

India	-0.2K
Pakistan	-0.2K
Bangladesh	-0.0K
All Other	-
TOTAL	-0.4K

EXPORTS BY DESTINATION (CURRENT WEEK)

India	2.5K
Thailand	1.6K
All Other	0.9K
TOTAL	5.0K

DEMAND SNAPSHOT (WoW)

Total Commitments	496.5K
Commitments Last Week	494.1K
WoW Change	+2.4K
YoY Change	+30.2K

USDA

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Sources: USDA Weekly Export Sales Report (apps.fas.usda.gov) • SunSirs PSF Price (sunsirs.com) • Trading Economics (tradingeconomics.com) • ICE Futures

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales • Week 52 • Ending July 30, 2026 • MY Aug 2025 – Jul 2026 • Final Week

MY 2025/26 closes at 496.5k bales, up 6.5% on last year — with 109.7k, a fifth of the season, already committed to the new crop

All quantities in thousands of running bales (RB). Comparisons are week-over-week unless noted.

NET SALES	WEEKLY EXPORTS	TOTAL COMMITMENTS	SHIPPED TO DATE	MY 26/27 FORWARD BOOK
-0.4 k RB	**5.0** k RB	**496.5** k RB	**90.1** %	**109.7** k RB
▼ 3.1k RB buy-back	▲ 0.5k vs 48	▲ 6.5% YoY (↑ 465.4k)	447.4k of 496.5k | LY 91.6%	▲ 8.3k | 22% of current MY

THIS WEEK IN THE MARKET

The season ended with the new-crop book still accelerating. Forward sales added 8.3k RB in the final week – the largest weekly add of the year, for the second straight week – closing the MY 26/27 book at 109.7k, 22% of the season just ended. India took 7.2k of it, lifting its forward position to 44.0k over a fifth of its just-closed commitment this year-to-date.

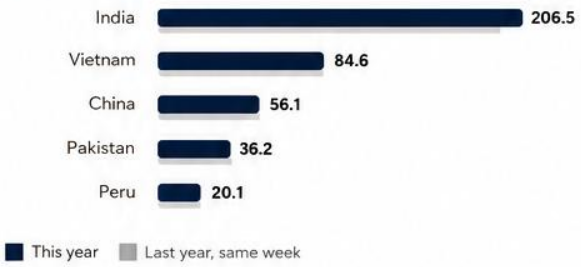
The final tallies land ahead of last year across the board. Total commitments closed at 496.5k RB (+6.5% YoY) and accumulated exports at 447.4k (+5.0%), with 90.1% of commitments delivered versus 91.6% last season. The only current-year movement in the demand week was a 0.4k RB buy-back – housekeeping, not demand.

Shipments finished on the anchor buyer. Final-week exports of 5.0k RB were led by India (3.8k) with China (0.7k) closing out its year. The +8.1k RB left unshipped rolls forward as the opening balance of the new marketing year.

- **MY 2025/26 closes ahead of last year on both demand (+6.5%) and shipments (+5.0%) — a stronger season on every headline measure.**
- **MY 26/27 opens with +158.8k RB ride-up on the books to 109.7k forward book plus 8.1k of carryover commitments.**
- **India ends the year as the market: 41.6% of season commitments and 40% of the new-crop book.**

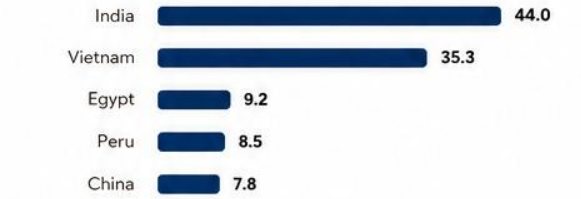
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



MY 2026/27 FORWARD BOOK

k RB, outstanding sales



SEASON SHIPMENT PROGRESS

% of commitments shipped



Season closer: MY 2025/26 finishes with **447.4k RB shipped** and 90.1% of commitments delivered. The 8.1k RB unshipped carries into MY 26/27 – which opens next week with **+158.8k RB on the books** (109.7k forward sales + carryover), the deepest opening position in recent years.

SUPIMA AT DTC RETAIL — POWERED BY PARTNER

Partial DTC/e-commerce panel • market index: "Supima" tag, monthly • brand cards: Supima-titled, weekly, wk ending Aug 1

The Supima market index printed its best non-holiday month on record – $18.4M in July, up 16% over June on Anniversary-Sale traffic – lifting the TTM to $204.8M. Nordstrom normalized to $1.23M after the sale peak. Original Favorites surged +161.8% to $106K as its 3-pack returned – an early back-to-school signal.

Market Index

SUPIMA-TAGGED • 8 BRANDS



L180 tagged products, monthly. Top: seven shown. Bottom: Kohls, ABC, SPARC, Original Favorites. July $18.4M is the best non-holiday month on record.

Nordstrom

OWN-LABEL SUPIMA • 121 SKUS



$1.23M

▼ 38.4% WoW

2,748 units

Post-Anniversary cooldown; the larger Supima Supima class stayed flat at $122K this week – the tail rotation is holding.

Top Products

SUPIMA-TITLED • 30 DAYS

1	Relaxed Supima LS Crew Tee — Nordstrom	$1.979K
2	4-Pack Supima® Briefs — Nordstrom	$818K
3	SS Cotton Supima Polo — Nordstrom	$782K

The LS crew did $188K over 30 days – Anniversary-Sale volume at a 42% realized price. All three leaders Nordstrom own-label.

Sources & method: USDA FAS Export Sales Reporting, CME, American Pima (raw cotton, wk ending 07/30/2026 (MY final week) • Partial retail estimates (DTC/e-commerce only – major Supima partners; Totals = normalized to "Supima"-titled; exclude non-Supima inline). • RB = Running bale (≈ 480 lbs. Brand covers Pima® included. DTC/e-commerce only – major Supima users outside it are not reflected. Prior-year = USDA prev-MY cumulative.

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OUTSIDE MARKETS INFLUENCING AMERICAN PIMA COTTON

WEEK ENDING AUG. 7TH, 2026

VOL. 8 ◆ ISSUE 54

PRIMARY DATA SOURCES: TRADING ECONOMICS (End of Day, Aug. 7, 2026) · SUNSIRS Textile Inputs · NOAA / CPC Weather & Climate · AGWEATHER.COM Ag Weather & Field Data · USDA Supply & Demand · FINVIZ Macro Markets

1. EXECUTIVE MARKET SNAPSHOT

MARKET INDICATOR	CURRENT VALUE	WEEKLY TREND	PIMA IMPACT
WTI Crude Oil (USD/bbl)	$78.18	↓ FALLING	Slight Headwind
U.S. Dollar Index (DXY)	98.81	↓ FALLING	Positive
ICE Cotton No. 2 (US ¢/lb)	84.38	↑ RISING	Positive
Polyester Staple Fiber (PSF) ≈ $0.5 RMB/ton ≈ $0.50 USD/lb*	7,555 RMB/ton ≈ $0.50 USD/lb*	— NEUTRAL	Neutral
Ocean Freight (FBX) (USD/40' container)	$3,543	↓ SOFTENING	Positive
U.S. 10-Year Treasury (%)	4.64%	↑ RISING	Slight Headwind
China Manufacturing PMI (Official)	49.3	↓ CONTRACTING	Slight Headwind
American Pima Landed Price Southeast Asia (USD/lb)	$1.86	↑ FIRMING	Positive

Note: All values represent market close Friday, Aug. 7, 2026.
* PSF conversion: RMB to USD using USD/CNY 7.17 (market close 8/7/26); 1 metric ton = 2,204.62 lb.

2. PIMA MARKET ENVIRONMENT INDEX (PMEI)



MODERATELY POSITIVE

PMEI TREND BY HORIZON	TREND
Weekly (1–2 Weeks)	↑ Improving
Intermediate (90-Day)	↑ Positive
Long-Term (YoY)	↑ Positive

PMEI reflects the overall influence of outside markets on American Pima cotton.

0 = Bearish · 50 = Neutral · 100 = Strongly Positive

3. KEY MARKET DRIVERS

How outside markets are moving this week

Energy (Oil)	Oil prices declined as global supply concerns eased and Middle East tensions showed signs of de-escalation.	Slight Headwind
U.S. Dollar	Dollar softened on rate cut expectations and improving risk sentiment.	Positive
Interest Rates	Treasury yields moved higher after strong jobs data and dovish Fed tone.	Slight Headwind
China Demand	China manufacturing PMI remained in contraction, indicating subdued demand and export pressure.	Slight Headwind
Freight Costs	Freight rates eased with declining congestion and improved vessel availability.	Positive

4. AMERICAN PIMA COMPETITIVE POSITION

COMPETITIVE DRIVER	CURRENT EFFECT	COMMENT
Oil Prices	Slight Negative	Lower energy reduces synthetic fiber costs modestly.
U.S. Dollar	Positive	Weaker dollar enhances export competitiveness.
Cotton Prices	Positive	Pima prices firming vs. upland and other long-staples.
Polyester (PSF)	Neutral	Stable PSF keeps synthetic costs neutral.
Ocean Freight	Negative	Lower freight improves delivered cost position.
China Demand (PMI)	Slight Negative	Weakening activity weighs on global textile orders.

Overall Competitiveness: Improved this week as stronger dollar, firm Pima prices, and easing freight costs offset weaker China demand and lower energy.

5. CEO COMMENTARY

WEEKLY REVIEW
Markets closed the week with a generally constructive tone for American Pima. Oil and freight eased, while the U.S. dollar weakened and Treasury yields increased. ICE cotton prices firmed higher, but Asian demand remains cautious. American Pima spot values held steady, reflecting continued support.

90-DAY OUTLOOK (INTERMEDIATE)
The intermediate outlook remains positive. Interest rates are expected to trend lower later this year, freight rates should ease seasonally, and strong fiber continues to support prices. Risks include softening China demand and potential volatility in energy markets.

LONG-TERM PERSPECTIVE (YOY)
Long-term fundamentals remain strong. Higher fiber quality, traceability, and sustainable production create a durable advantage for American Pima cotton. The premium segment will continue to outperform over the long run.

These outside-market conditions help determine the global positioning and long-term demand for American Pima cotton.

6. LOOKING AHEAD – KEY EVENTS TO WATCH

DATE	EVENT	POTENTIAL IMPACT
Aug 11	WASDE Report (Aug)	Supply & Demand
Aug 12	CPI Inflation (Jul)	Inflation / Rates
Aug 13	PPI Inflation (Jul)	Inflation / Rates
Aug 15	Retail Sales (Jul)	Consumer Demand
Aug 19	FOMC Meeting Minutes (Jul)	Interest Rates / Dollar

*Dates subject to change. All times Central.

USDA WEEKLY EXPORT SALES REPORT WEEK 33 – ENDING AUG. 7, 2026

- Net sales of -0.4k bales.
- 2026/27 forward sales of 5.0k bales.
- Weekly exports of 5.0k bales (down 0.0% vs last week).
- Total commitments reached 496.5k bales.
- Commitments are up 6.5% vs last week and ahead of last year by 30.5%.

Source: USDA FAS Export Sales Report
Data as of Aug. 7, 2026.

NET SALES BY DESTINATION (CURRENT WEEK)

India	-0.2K
Pakistan	-0.2K
Bangladesh	-0.0K
All Other	–
TOTAL	-0.4K

EXPORTS BY DESTINATION (CURRENT WEEK)

India	2.5K
Thailand	1.6K
All Other	0.9K
TOTAL	5.0K

DEMAND SNAPSHOT (WoW)

Total Commitments	496.5K
Commitments Last Week	494.1K
WoW Change	+2.4K
YoY Change	+30.2K

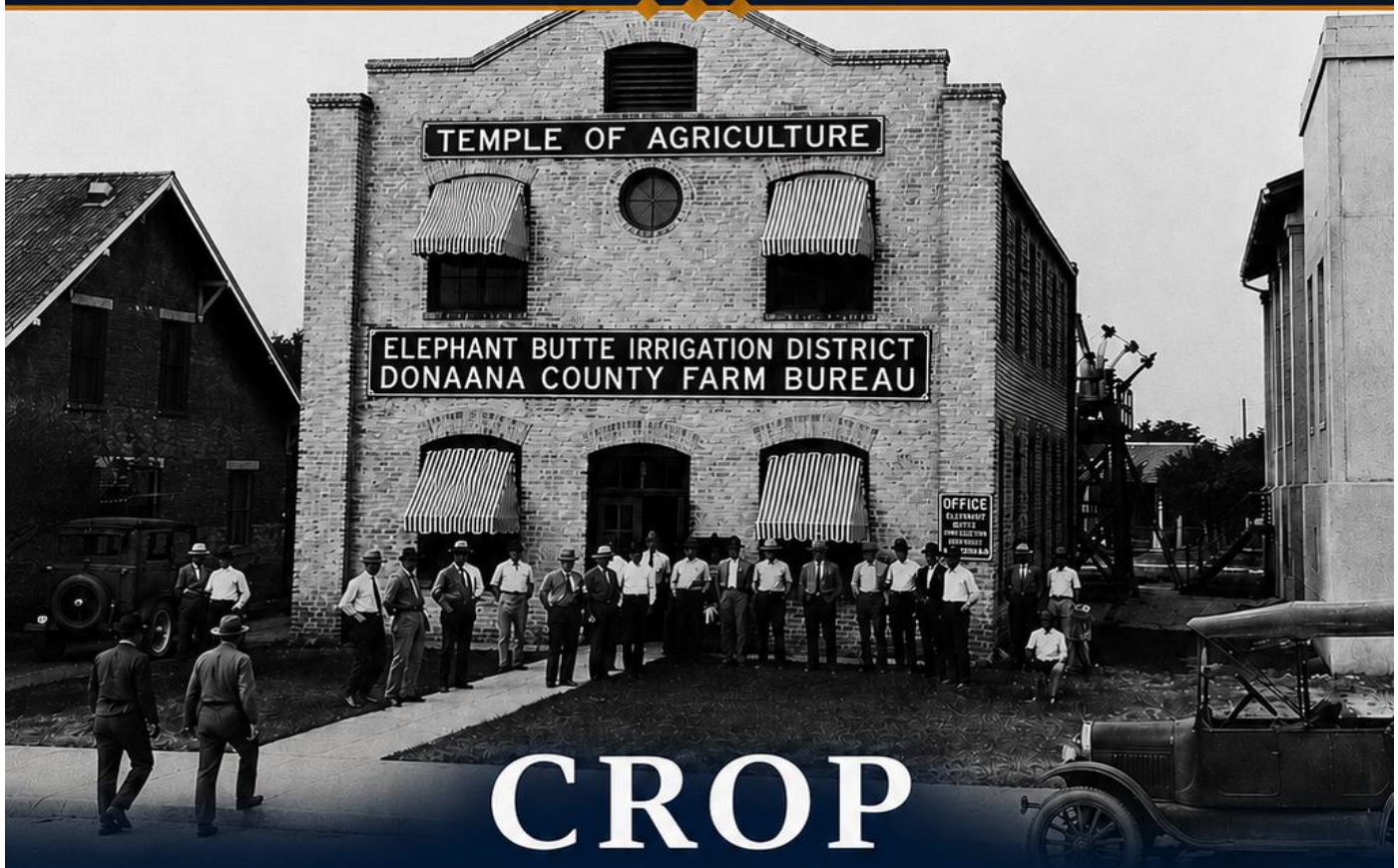
USDA

Rick Neuenschwander
CEO, PCIA / PIMA GROWERS

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CROP INTELLIGENCE

FIELD CONDITIONS | CROP PROGRESS | WEATHER IMPACTS | IRRIGATION UPDATE | PEST & DISEASE SCOUTING | YIELD OUTLOOK

Timely Insights. Stronger Decisions. Better Outcomes.

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WEEKLY CROP PROGRESS & FIELD INTELLIGENCE

AMERICAN PIMA PRODUCTION UPDATE

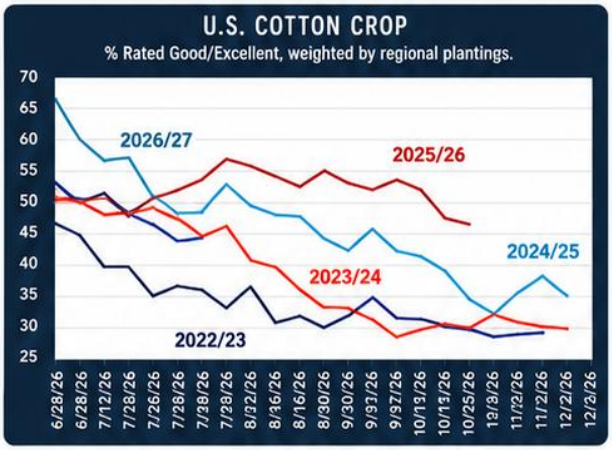
These 15 States planted 99% of the 2025 cotton acreage

WEEK ENDING
AUGUST 3, 2026
VOL. 8 ◆ ISSUE 30



EXECUTIVE FIELD SUMMARY

The US cotton crop is progressing. Almost 90% of the crop is squaring as of Sunday Aug 2, which is equal to the 5-year average. Cotton setting bolls is very close to the 5-year average and the percentage of bolls estimated to be open is at 4% - down from the 5-year average of 6%. The overall crop condition index deteriorated from last week with only 42.1% of the crop rated good to excellent compared to 46.4% the prior week. There were a number of states with notable declines, but North Carolina, Oklahoma, Texas and Virginia stand out with Tennessee coming close to notable.



COTTON CONDITION – SELECTED STATES: WEEK ENDING AUGUST 2, 2026

[These 15 States planted 99% of the 2025 cotton acreage]

State	Very poor (percent)	Poor (percent)	Fair (percent)	Good (percent)	Excellent (percent)
California	-	-	5	5	90
Arizona	-	2	9	57	34
Texas	8	22	42	24	4

CROP CONDITION CHANGE: JULY 26 vs. AUGUST 2, 2026

GOOD + EXCELLENT (%)

State	July 26, 2026 Good + Excellent	August 2, 2026 Good + Excellent	Change (percentage points)
California	95%	95%	—
Arizona	90%	91%	+1
Texas	34%	28%	-6

Source: USDA Crop Progress Reports

PIMA GROWERS INTERPRETATION

CALIFORNIA: LEADING THE WAY

California continues to demonstrate exceptional crop uniformity with 95% of acreage rated Good to Excellent. Favorable irrigation management and consistent heat-unit accumulation have accelerated boll development while maintaining excellent fruit retention.

ARIZONA: PEAK GROWTH APPROACHING

Arizona remains the most advanced production region. Rapid boll set suggests irrigation scheduling will become increasingly critical over the next two weeks as peak water demand approaches.

TEXAS: WATCH LIST

Crop development continues to advance across Texas, with squaring, boll set, and boll opening progressing on schedule. However, overall crop condition deteriorated this week, with the percentage rated Good to Excellent declining from 34% to 28%. Persistent heat, uneven rainfall, and moisture stress continue to create significant variability between fields, making irrigation management and boll retention the primary priorities through peak bloom.

AGRONOMIC IMPLICATIONS

Current crop progress indicates that California and Arizona are entering the period where boll retention will have the greatest influence on final lint yield. Irrigation timing, potassium availability, and avoidance of excessive vegetative growth should now become management priorities.

MARKET PERSPECTIVE

Current crop conditions continue supporting expectations for high-quality American Pima production. While national cotton ratings remain mixed, the Pima belt continues to perform substantially above the U.S. average.

INTERPRETATION

California remained exceptionally stable at 95% Good to Excellent. Arizona improved one percentage point overall, although acreage shifted from Excellent into Good. Texas recorded the meaningful deterioration, falling six percentage points as Very Poor and Poor acreage increased from 24% to 30%.

DATA + SOURCES
USDA, National Agricultural Statistics Service (NASS)
Crop Progress Report
Released August 3, 2026
These 15 States planted 99% of the 2025 cotton acreage.

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JUNE 30, 2026
VOL. 8 | ISSUE 27

PCIA AMERICAN PIMA ACREAGE OUTLOOK

USDA PROSPECTIVE PLANTINGS REPORT — JUNE 30, 2026

U.S. COTTON ACRES (ALL COTTON)

9.85 MILLION ACRES

↑ +2% vs. March 2026

(Up from 9.64 million in March)

UPLAND COTTON

9.70 MILLION ACRES

↑ +2% vs. March 2026

(Up from 9.51 million in March)

AMERICAN PIMA COTTON

150,000 ACRES

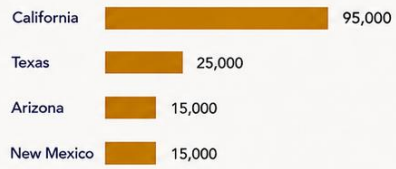
↑ +15% vs. March 2026

(Up from the 130,000 predicted in March)

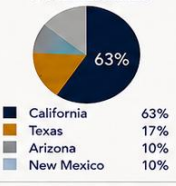
AMERICAN PIMA ACREAGE BY STATE (ACRES)

STATE	2024	2025	2026	CHANGE VS 2025
Arizona	14,000	15,500	15,000	-3%
California	145,000	92,000	95,000	+13%
New Mexico	15,000	13,000	15,000	+15%
Texas	33,000	21,000	25,000	+19%
UNITED STATES TOTAL	207,000	141,500	150,000	+6%

2026 AMERICAN PIMA ACRES BY STATE



STATE SHARE OF U.S. PIMA ACRES



PCIA TAKEAWAY

American Pima Cotton: 150,000 acres (up from the 130,000 predicted in March)
All Cotton: 9.85 million acres (up from 9.64 million in March)
Upland Cotton: 9.70 million acres (up from 9.51 million in March)
USDA projects 2026 American Pima acreage at 150,000 acres, up 15% from March predictions and up 6% from 2025 but still 27% below 2024 levels. California remains the dominant production region with approximately 63% of total U.S. Pima acreage, while New Mexico and Texas show increases in planted area. Continued acreage contraction highlights the importance of strengthening demand, expanding premium markets, and developing domestic field-to-fiber opportunities for American Pima cotton.

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Supima cotton represents less than 1% of the world's cotton and is grown exclusively in the United States.

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AMERICA'S FINEST COTTON

AS OF
JULY 10, 2026
VOL. 8 | ISSUE 28

U.S. BALANCE SHEET – IN 1,000 480-LB BALES

Source: USDA WASDE – As of July 10, 2026 *(June 2026 WASDE)*

2025 CROP YEAR			
USDA	JUL 2026 2025/26		Est. 2025/26
	All Cotton	Upland	Pima
Beg Stks	4,000	3,833	167
Prod	13,897	13,492	405
Imports	5	5	0
Tot Supply	17,902	17,330	572
Cons	1,550	1,545	5
Exports	12,200	11,750	450
Tot Demand	13,750	13,295	455
Unacct	48	48	0
End Stks	4,200	4,083	117

2026 CROP YEAR			
USDA	JUL 2026 2026/27		Est. 2026/27
	All Cotton	Upland	Pima
Beg Stks	4,200	4,083	117
Prod	13,700	13,325	375
Imports	5	5	0
Tot Supply	17,905	17,413	492
Cons	1,600	1,595	5
Exports	12,300	11,900	400
Tot Demand	13,900	13,495	405
Unacct	95	95	0
End Stks	4,100	4,013	87

Note: Totals may not add due to rounding. | All data in 1,000 480-lb bales.

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PIMA GROWERS

AMERICA'S FINEST COTTON

AMERICAN PIMA LOAN VALUE GUIDE

2026 CROP ELS (AMERICAN PIMA COTTON)

Source: USDA Farm Service Agency (FSA)

Published by PCIA • Presented by PIMA GROWERS

Schedule of Loan Rates for Eligible Qualities

2026-Crop ELS Cotton Stored in Approved Warehouses in all Locations.

Cents per pound, net weight, micronaire 3.5 & above and strength of 37.0 and above 1/

BASE LOAN RATE BY GRADE AND STAPLE (CENTS PER POUND)

GRADE	STAPLE LENGTH		
	1-3/8 INCH (44 STAPLE) 2026 LOAN	1-7/16 INCH (46 STAPLE) 2026 LOAN	1-1/2 INCH (48 & LONGER) 2026 LOAN
1	97.95	101.00	**101.95**
2	97.65	100.75	**101.70**
3	94.25	98.45	**98.95**
4	79.80	84.00	**84.50**
5	70.70	72.85	**72.85**
6	66.25	67.85	**67.85**
Below 6	57.25	57.25	**57.25**

BENCHMARK QUALITY

Grade 2 • Leaf 2
Staple 48+

LOAN VALUE

101.70¢/LB

This is the benchmark quality used in most PCIA market reporting.

QUALITY ADJUSTMENTS (DISCOUNTS)

LEAF DISCOUNTS (POINTS PER POUND)

LEAF GRADE	DISCOUNT
1	0.00
2	0.00
3	-3.45
4	-3.60
5	-3.70
6	-3.80
7	-3.80

MICRONAIRE DISCOUNTS (POINTS PER POUND)

MICRONAIRE READING	DISCOUNT
3.5 & higher	0
3.3 – 3.4	-5.00
3.0 – 3.2	-10.00
2.7 – 2.9	-15.00
2.6 & lower	-20.00

STRENGTH DISCOUNTS (POINTS PER POUND)

STRENGTH READING (G/TEX)	DISCOUNT
37.0 & higher	0
36.0 – 36.9	-11.50
35.0 – 35.9	-14.00
34.9 & lower	-16.50

EXTRANEOUS MATTER PENALTIES (POINTS PER POUND)

CONDITION	LEVEL 1	LEVEL 2
Preparation	-8.10	-10.95
Plastic	-40.00	-40.00
Grass, Spindle Twist, Bark & Other	-7.15	-10.35

PIMA QUALITY TARGETS

Color	2
Leaf	2
Staple	48+
Micronaire	3.5 – 4.9
Strength	37+

KEY TAKEAWAY

Moving from Grade 2 / Staple 48+ to Grade 3 / Staple 48+ reduces loan value from 101.70¢ to 98.95¢ per pound. Maintaining premium quality remains one of the largest controllable drivers of grower revenue.

1/ A micronaire premium of 35 points (0.35 cents) per pound is reflected in the loan rates for the eligible qualities. Also, a strength premium of 56 points (0.56 cents) per pound is reflected in the loan rates for the eligible qualities.

Source: USDA Farm Service Agency (FSA), 2026 Extra-Long Staple (ELS) Cotton Loan Schedule. Loan rates shown are official USDA values and have been reformatted for educational purposes by PCIA.

No additional discounts are applied to eligible qualities below color grade 6.

This publication is intended for educational and informational purpoes only. Producers should consult official USDA Farm Service Agency publications for program eligibllity requirements and current loan provisions.

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON



WEATHER

CLIMATE • MOISTURE • TEMPERATURE • FORECASTS

Monitoring the conditions that shape yield, quality, and profitability across the American Pima Belt.

TEMPERATURE	RAINFALL	DROUGHT	IRRIGATION	HEAT UNITS (DD60s)	FORECAST OUTLOOK
				DD 60s	

Weather Drives Yield. Information Drives Decisions.

EST. **PIMA GROWERS** 2018

AMERICA'S FINEST COTTON

COTTON THERMAL STRESS SUMMARY

TRACKING HEAT EXPOSURE FROM APPROVED PLANTING DATES

WEATHER & RISK SERIES

WEEK ENDING
AUGUST 7, 2026
VOL. 8 ◆ ISSUE 48

EXECUTIVE SUMMARY

Heat stress continues to diverge across the American Pima production region. Safford, Arizona remains the highest cumulative thermal stress environment with 71+ stress points since planting, followed by Fresno, California (60) and El Paso, Texas (52). Lubbock remains moderate while Deming continues to experience comparatively limited cumulative heat stress.

Although daytime heat remains the principal driver of accumulated stress, elevated nighttime temperatures continue contributing to respiratory losses and reduced carbohydrate availability during reproductive growth. Regional interpretation should always consider crop stage, irrigation management, canopy temperature, humidity, wind movement and duration of consecutive heat events.

I. EXECUTIVE THERMAL STRESS SUMMARY BY REGION

REGION	DAY STRESS (Days Tmax ≥ 95°F)	NIGHT STRESS (Nights Tmin ≥ 79°F)	COMBINED STRESS DAYS (Day + Night in Same 24-Hour Cycle)	TOTAL POINTS (Day + Night)	RISK (Overall Heat Exposure Relative to Stage)
SAFFORD, AZ	61	10	7	71+	HIGH
FRESNO, CA	54	6	6	60	HIGH
EL PASO, TX	45	7	4	52	HIGH
LUBBOCK, TX	33	4	1	37	MODERATE
DEMING, NM	24	1	0	25	LOW-MODERATE

RISK KEY: HIGH (≥35 Points) · MODERATE-HIGH (30–34 Points) · MODERATE (20–29 Points) · LOW-MODERATE (≤20 Points)

II. COTTON CRITERIA & THRESHOLDS

Modified Day/Night Ambient Stress Formula (Bayer)

COMPONENT	POINT RULE
DAY HEAT STRESS	+1 when Tmax ≥ 95°F
NIGHT HEAT STRESS	+1 when Tmin ≥ 79°F

WHAT IS A STRESS POINT?

A stress point is logged whenever the 24-hour cycle breaches a critical biological threshold.

Examples:

- If Tmax ≥ 95°F on a given day = +1 point
- If Tmin ≥ 79°F that night = +1 point
- If both occur in the same 24-hour cycle = 2 points (counted as combined day)

III. WHY CROP DEVELOPMENT MATTERS

CROP STAGE	PHYSIOLOGICAL POSITION	PRIMARY HEAT CONSEQUENCE
ESTABLISHMENT	Planting to early vegetative growth	Heat primarily increases evaporative demand and slows establishment when soil moisture is inadequate.
SQUARING	Fruit-site initiation	Repeated heat can reduce future reproductive capacity and increase irrigation demand before bloom.
FIRST BLOOM	Beginning of effective flowering	Pollen development and fertilization become sensitive; heat begins to affect boll-set potential.
PEAK BLOOM	Maximum flowering and boll loading	Highest risk period. Day heat raises water demand, warm nights increase respiration and compete for stored carbohydrates.
BOLL FILL	Rapid seed and fiber growth	Stress can reduce carbohydrate supply, accelerate shedding, restrict boll weight, and shorten the effective filling period.
CUTOUT / MATURITY	Declining new fruit production	New reproductive loss is less important, but severe stress may still limit late boll retention and fiber development.

IV. PRINCIPAL PHYSIOLOGICAL IMPACTS

CARBOHYDRATE DRAIN
Warm nights increase dark respiration, consuming sugars that would otherwise support flowers and developing bolls.

POLLEN AND FERTILIZATION
High reproductive temperatures can reduce pollen production, pollen viability, reduce dehiscence, and fertilization success.

FRUIT RETENTION
A shortage of assimilates and reproductive injury can increase square and young-boll abscission, often becoming visible several days after the heat event.

WATER DEMAND
Daytime heat increases evapotranspiration. Adequate soil moisture can protect canopy temperature, but it does not eliminate evaporative respiration losses.

BOLL & FIBER DEVELOPMENT
Sustained heat can shorten the boll-filling period, reduce boll weight and seed size, number, and affect fiber length, strength, or micronaire.

PIMA GROWERS INTERPRETATION

The thermal index is a screening and comparison tool, not a stand-alone yield loss model. Risk should be interpreted with crop stage, irrigation status, humidity, wind, canopy temperature, cultivar, fruit load, and the duration of consecutive stress events.

Heat stress does not cause immediate yield loss. The impact is realized days to weeks later through reduced boll set, increased shedding, smaller bolls, and reduced fiber quality.

DATA AND SCIENTIFIC BASIS

- Daily weather observations: official station networks from university mesonets and agricultural weather systems.
- Sources: see station list below. Backup data from NOAA/NCEI and NOAA Cooperative Observer Network.
- Cotton Foundation, Stress Physiology in Cotton: high night temperature increases respiration, lowers soluble carbohydrate concentrations, increases abscission, and reduces yield.
- Cotton Physiology Today: warm nights during bloom increase carbohydrate drain and may contribute to small-boll shedding and pollen sterility, with Pima cotton especially sensitive.
- Peer-reviewed cotton heat-stress literature: reproductive development, pollen function, boll retention, and fiber development are among the

IMPORTANT NOTE: Interpret with crop stage, irrigation management, soil moisture, humidity, canopy temperature, wind speed, cultivar, fruit load, duration of stress. Monitor closely and adjust management accordingly.

PRIMARY WEATHER STATION SOURCES (UNIVERSITY MESONET / AGRICULTURAL NETWORKS)

SAFFORD, AZ
AZMET – Safford Valley
University of Arizona
azmet.arizona.edu

FRESNO, CA
CIMIS – Fresno
California Dept. of Water Resources
cimis.water.ca.gov

DEMING, NM
NMSU Agricultural Weather Network – Deming Area
New Mexico State University
weather.nmsu.edu

EL PASO, TX
TexasET Network – El Paso
Texas A&M AgriLife
texaset.tamu.edu

LUBBOCK, TX
Texas Tech Mesonet – Lubbock
Texas Tech University
mesonet.ttu.edu

Backup Sources (in order): 1) USDA 2) NOAA/NCEI 3) NOAA Cooperative Observer Network 4) NOAA ASOS/AWOS (if no agricultural station available)

SOURCES: University Mesonet & Agricultural Weather Networks listed above • NOAA/AWOS • NOAA NCEI Regional Observations • USDA • Cotton Foundation • Bayer Crop Science (Cotton Growth & Development)
Market data as of market close Friday, August 7, 2026.

EST. **PIMA GROWERS** 2018

AMERICA'S FINEST COTTON

IRRIGATION INTELLIGENCE & CROP WATER USE DASHBOARD

DECISION SUPPORT FOR AMERICAN PIMA GROWERS

REFERENCE ET CALCULATION: | ETo = ETo × Kc | BASE TEMPERATURE: 60°F | UNITS: INCHES

WEEK ENDING
AUGUST 7, 2026
VOL. 8 ◆ ISSUE 48

1. REGIONAL CROP DEVELOPMENT & DD60 SUMMARY

LOCATION	AVG. PLANTING DATE	DAYS AFTER PLANTING AUG 7, 2026	DD60s* (Base 60°F)	WEEKLY DD60 GAIN (JUL 31 – AUG 7)	CURRENT GROWTH STAGE (DD60 RANGE)
Deming, NM	Apr 20	110	1,620	+108	Boll Fill / Early Open Boll (1,383 – 2,270)
Fresno, CA	Apr 10	120	1,738	+114	Boll Fill / Early Open Boll (1,383 – 2,270)
El Paso, TX	May 1	98	1,498	+133	Peak Bloom / Boll Fill (1,280 – 1,383)
Safford, AZ	May 5	95	1,402	+136	Peak Bloom (924 – 1,280)
Lubbock, TX	May 15	85	1,161	+104	First Bloom / Early Bloom (752 – 924)

*Weekly DD60 Gain = DD60s this week minus DD60s last week.
Positive values indicate crop development progress.

2. SEASONAL COTTON WATER USE CURVE (TYPICAL)

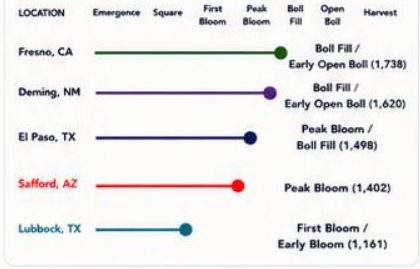
This curve represents typical cotton water use across the season.
Actual timing varies by region.



	Emergence	Square	First Bloom	Peak Bloom	Boll Fill	Open Boll	Harvest
ETc (in/day)	0.01	0.03	0.12	0.46	0.48	0.30	0.02

Water demand increases rapidly through bloom and peaks at peak bloom. Protect adequate soil moisture in the root zone during this critical period to support boll retention, yield potential, and fiber quality.

CURRENT CROP POSITION OF EACH REGION (BASED ON DD60s)



CURRENT DAILY ET DEMAND (in/day) (BASED ON ETc)

Deming, NM	0.40
Fresno, CA	0.38
El Paso, TX	0.37
Safford, AZ	0.37
Lubbock, TX	0.31

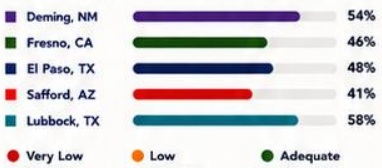
ETc = Crop Water Use (in/day)
ETo = Reference Evapotranspiration (in/day)

3. WEATHER & WATER DEMAND SUMMARY

LOCATION	5-DAY RAIN (in)*	7-DAY RAIN (in)*	EFFECTIVE RAIN (in)**	WEEKLY IRRIGATION NEED
Deming, NM	0.04	0.12	0.07	2.32
Fresno, CA	0.00	0.00	0.00	2.66
El Paso, TX	0.08	0.23	0.14	2.41
Safford, AZ	0.00	0.00	0.00	2.59
Lubbock, TX	0.28	0.72	0.43	2.04

*Rainfall measured at local university/mesonet stations.
**Effective Rainfall = Total rainfall × 0.60
(Adjustment for runoff, evaporation, and non-availability)
Positive values indicate irrigation needed.

4. ROOT ZONE WATER STATUS (0–24")



● Very Low (0–25%) ● Low (25–50%) ● Adequate (70–100%)

Percent is an estimate of available water in the 0–24" root zone.

5. SOIL WATER HOLDING CAPACITY & IRRIGATION FREQUENCY GUIDE

SOIL TYPE	AVAILABLE WATER (in/ft of soil)	TYPICAL DAYS BETWEEN IRRIGATIONS
Sand	0.5	2 – 3
Sandy Loam	1.2	3 – 5
Loam	1.8	5 – 7
Clay Loam	2.2	6 – 9
Clay	2.8	8 – 12

*Approximate. Adjust based on ET demands, crop stage, field conditions and irrigation system.

6. SEASONAL WATER BUDGET (EST. THROUGH HARVEST)

LOCATION	TOTAL WATER NEEDED (in)	REMAINING WATER REQUIREMENT (in)
Deming, NM	16.6	8.1
Fresno, CA	16.6	7.4
El Paso, TX	15.7	7.2
Safford, AZ	15.6	6.8
Lubbock, TX	12.8	7.1

Remaining requirement = Jul 31 remaining minus (Aug 1–7 ETc) plus effective rainfall.

7. COTTON DEVELOPMENT REFERENCE (DD60 GUIDE)

GROWTH STAGE	AVG. DD60s	TYPICAL DAYS AFTER PLANTING	WATER DEMAND
Emergence	110	8	Low
First True Leaf	166	17	Low
5th True Leaves	463	35	Moderate
Pinhead Square	517	42	Moderate
1/3 Green Square	752	52	Increasing
First Bloom	924	67	High
Peak Bloom	1,280	97	Very High
First Open Boll	1,383	102	Very High
Mature Boll	2,270	145+	Low

Cotton development is primarily driven by accumulated heat units (DD60s) rather than calendar days. Actual timing varies with planting date, temperature, and local growing conditions.

8. IRRIGATION TERMINATION GUIDELINES

Consider terminating irrigation when:

- Final harvestable bolls are mature.
- Adequate soil moisture remains in the root zone.
- Weather forecast supports cutoff (low ET & rainfall probability).
- NAWF (Number of Accumulated White Flowers) is < 4.
- A high percentage of bolls are open.

Proper termination saves water and energy while protecting fiber quality and yield.

9. IRRIGATION OUTLOOK & RECOMMENDATION

PIMA IRRIGATION INDEX™ (0–10)



Irrigation demand remains very high as we move further into peak bloom and early boll fill. Continue to maintain adequate soil moisture in the root zone to protect yield and fiber quality during this critical period.

WATER DEFICIT TRACKER (ROOT ZONE 0–24")	
Current Root Zone Storage (inches)	2.3
ET Loss This Week	-2.6
ET Deficit Gained This Week	+0.0
Irrigation Applied This Week	+2.9
Net Water Deficit (inches)	8.6

DEFICIT STATUS: Moderate to High Deficit
Irrigation required to maintain adequate soil moisture.

10. DATA SOURCES BY REGION

Deming, NM	NMSU Agricultural Weather Network
Fresno, CA	CIMIS – California Irrigation Management Information System
El Paso, TX	TexasET Network – Texas A&M AgriLife
Safford, AZ	AZMET – University of Arizona
Lubbock, TX	Texas Tech Mesonet

ABOUT THE DATA

All data are aggregated from official university mesonet stations and agricultural weather networks. Data should be validated relative to on-farm conditions and used as a decision-support tool.

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SOURCES: University Mesonet & Agricultural Weather Networks listed above • NOAA/AWOS • NOAA NCEI Regional Observations • USDA • Cotton Foundation • Bayer Crop Science (Cotton Growth & Development)

Market data as of market close, Friday, August 7, 2026.

EST. **PIMA GROWERS** 2018

AMERICA'S FINEST COTTON

WEATHER RISK & INTELLIGENCE DASHBOARD

REGIONAL AG & CROP DEVELOPMENT OUTLOOK

WEEK ENDING
AUGUST 7, 2026
VOL. 8 ◆ ISSUE 48

EXECUTIVE SUMMARY

Heat stress remains elevated across the American Pima belt with daily highs above 100°F common. Texas and Arizona continue to face growing drought deficits, while New Mexico has received beneficial monsoon rainfall—Deming is now slightly above normal. West Texas needs additional rain to support crop success heading into peak bloom and boll set.

Focus: Manage heat stress, protect soil moisture, and prepare for late-season water demand.



I. YEAR-TO-DATE PRECIPITATION MATRIX

(JANUARY 1 – AUGUST 7, 2026)

Location	2026 YTD Precipitation (inches)	Historical Average (inches)	Departure from Normal (inches)	Hydrological Crop Impact
Fresno, CA	7.21	7.92	-0.71	Slight Deficit: Minor irrigation demand increase continuing.
Safford, AZ	3.84	4.35	-0.51	Slight Deficit: Heat stress high; monsoon relief still needed.
Deming, NM	5.76	5.41	+0.35	Slight Surplus: Recent monsoonal rains improving outlook.
El Paso, TX	3.81	4.72	-0.91	Moderate Deficit: Continued dryness in Far West Texas.
Lubbock, TX	5.76	8.63	-2.87	Moderate to Severe Deficit: Drought concerns persist.

Notes: Departures are calculated from 1991–2020 PRISM Climate Normals.
Positive values indicate wetter than normal.

II. 1-WEEK REGIONAL WEATHER & DEVELOPMENT MATRIX

(JULY 31 – AUGUST 7, 2026)

City & Region	High Temps (°F)	Low Temps (°F)	Rain & Monsoon Outlook	Target DD60 Heat Units	Anticipated Daily Crop ETc
Fresno, CA (San Joaquin Valley)	101 – 105	68 – 72	Dry (0% rain); upper-level ridge maintains heat.	30 – 32 DD60s / day (Accelerated reproductive pace)	0.30" – 0.33" / day (Maximum environmental drain)
Safford, AZ (Gila Valley)	100 – 106	67 – 73	Monsoon chances 30% – 40% with isolated storms.	20 – 25 DD60s / day (Steady fruit setting)	0.22" – 0.25" / day (Varies with storm activity)
Deming, NM (Southwest NM)	92 – 99	65 – 69	Monsoon active; 40% – 50% daily storm chances.	18 – 22 DD60s / day (Slowed by moisture & cloud cover)	0.18" – 0.21" / day (Suppressed by moisture)
El Paso, TX (Far West Texas)	95 – 102	71 – 75	Low rain (10%); dry & hot pattern continues.	22 – 25 DD60s / day (Balanced accumulation)	0.23" – 0.26" / day (Post-frontal evaporation)
Lubbock, TX (Texas Panhandle)	97 – 103	70 – 74	Mostly dry (0%); heat persists with elevated winds.	26 – 30 DD60s / day (Sharp thermal accumulation)	0.27" – 0.31" / day (High evaporative demand)

DD60 Base: 60°F (16°C) | ETc = Crop Water Use (in/day)
Values are station averages; ranges reflect local variability.

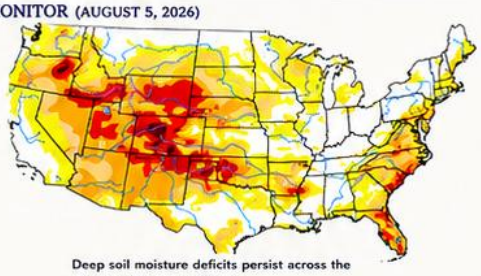
III. WEATHER & WATER DEMAND SUMMARY

Location	5-Day Rain (inches)*	7-Day Rain (inches)*	Effective Rain (inches)**	Weekly Irrigation Need (inches)***
Deming, NM	0.58	0.92	0.55	1.45
Fresno, CA	0.00	0.02	0.01	2.70
El Paso, TX	0.10	0.22	0.13	2.20
Safford, AZ	0.18	0.32	0.19	2.30
Lubbock, TX	0.20	0.35	0.21	2.00

*Rainfall measured at local university/mesonet stations.
**Effective Rainfall = Total rainfall × 0.60 (adjusts for runoff, evaporation, and non-availability).
***Weekly Irrigation Need = ETc (7-day total) minus Effective Rainfall. Positive values indicate irrigation needed.

IV. U.S. DROUGHT MONITOR (AUGUST 5, 2026)

- D0 Abnormally Dry
- D1 Moderate Drought
- D2 Severe Drought
- D3 Extreme Drought
- D4 Exceptional Drought

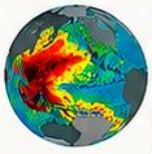


Approx. 40% of the contiguous U.S. remains in moderate drought (D1) or worse.

Source: U.S. Drought Monitor

Deep soil moisture deficits persist across the Southwest into West Texas.

V. ENSO STATUS & HARVEST OUTLOOK



JULY 2026: RAPID SEA SURFACE WARMING!
[LATEST NINO 3.4: +1.9°C (STRONG EL NIÑO)]

Current Diagnostic State: The NOAA Climate Prediction Center notes above-average sea surface temperatures are intensifying across the east-central equatorial Pacific, with strong atmosphere-ocean coupling firmly locked in.

Super El Niño Intensity: NOAA forecasters have raised confidence intervals to an 81% probability of a historically strong "Super El Niño" by October-December. Ensembles indicate the event could track near +3.6°C above normal in the Niño 3.4 index, threatening to shatter modern records.

Impending Late-Season Impact: Early extension of the southern subtropical jet stream is likely (favorable for late autumn-high risk for southern rainfall during late Oct. & Nov. detiation). Expecting moisture on some years in some areas.

VI. PIMA GROWERS INTERPRETATION



Irrigation demand remains very high as we move further into peak bloom and early boll fill. Continue to maintain adequate soil moisture in the root zone to protect yield and fiber quality during this critical period.

VII. SOIL WATER HOLDING CAPACITY & IRRIGATION FREQUENCY GUIDE

SOIL TYPE	AVAILABLE WATER (in/ft of soil)	TYPICAL DAYS BETWEEN IRRIGATIONS
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*Approximate. Adjust based on ET demands, crop stage, field conditions and irrigation system.

VIII. COTTON DEVELOPMENT REFERENCE (DD60 GUIDE)

GROWTH STAGE	AVG. DD60s (BASE 60°F)	TYPICAL DAYS AFTER PLANTING	WATER DEMAND
Emergence	110	8	Low
First True Leaf	166	17	Low
5th True Leaves	463	35	Moderate
Pinhead Square	517	42	Moderate
1/3 Green Square	752	52	Increasing
First Bloom	924	67	High
Peak Bloom	1,280	97	Very High
First Open Boll	1,383	102	Very High
Mature Bolls	2,270	145+	Low

IX. IRRIGATION OUTLOOK & RECOMMENDATION

Sustained heat and persistent drought across Arizona and West Texas will keep irrigation demand very high through peak bloom and early boll fill. New Mexico's recent moisture will help buffer short-term demand but irrigation should continue based on soil moisture and ETc.

Apply irrigation efficiently, scout fields closely, and time applications to protect yield potential and fiber quality.

WATER DEFICIT TRACKER (ROOT ZONE 0–24")

Current Root Zone Storage (inches)	2.4
ET Loss This Week (inches)	-2.6
ET Deficit Gained This Week (inches)	+0.0
Irrigation Applied This Week (inches)	+2.9
Net Water Deficit (inches)	8.6

DEFICIT STATUS: Moderate to High Deficit
Irrigation required to maintain adequate soil moisture.

X. DATA SOURCES BY REGION

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Safford, AZ	AZMET – University of Arizona
Lubbock, TX	Texas Tech Mesonet

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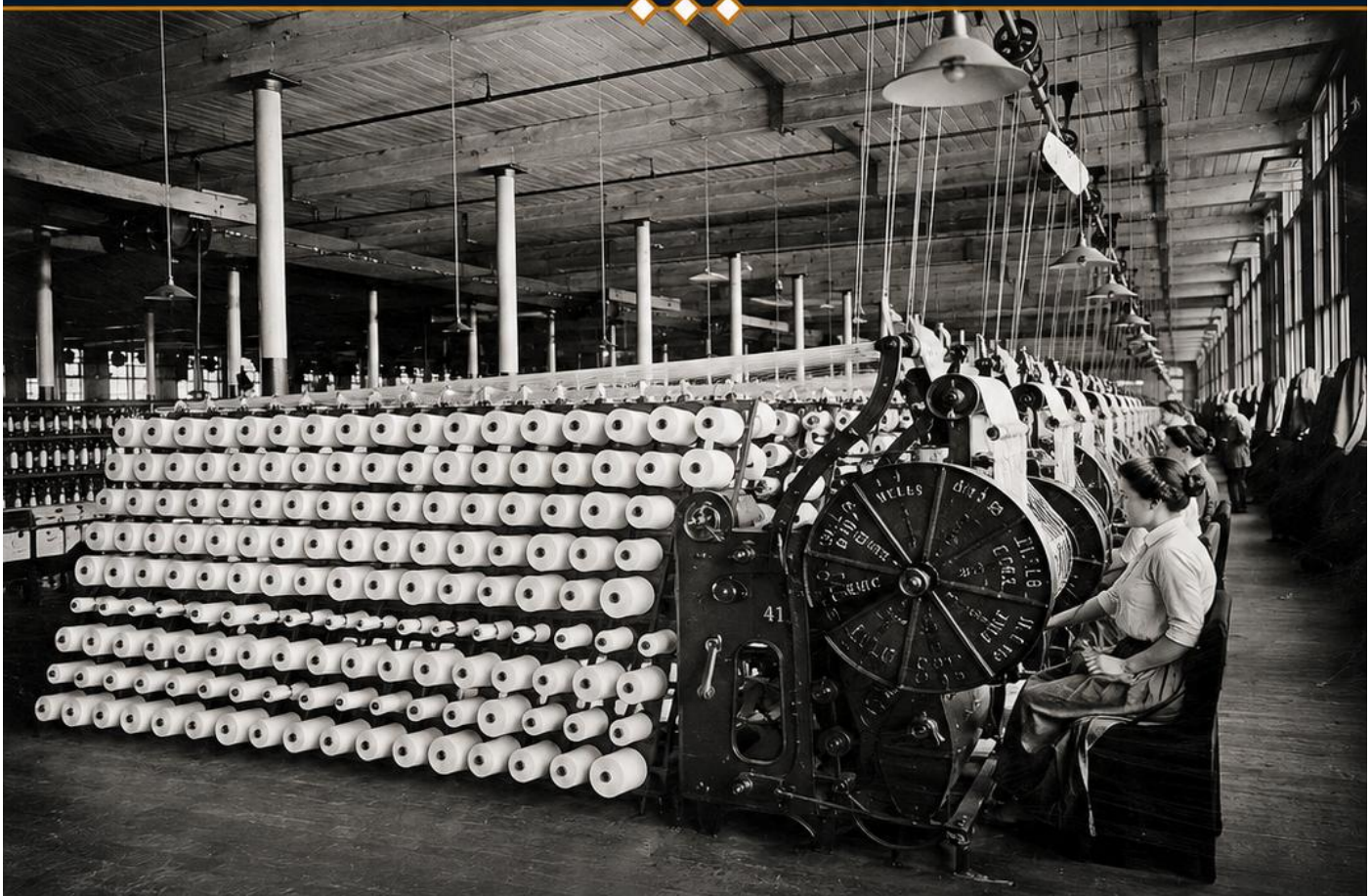
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Market data as of market close, Friday, August 7, 2026.

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON



FIELD TO FIBER

THE JOURNEY OF PIMA® COTTON

GROWN WITH CARE › HARVESTED WITH PRIDE › GINNED WITH PRECISION › SPUN WITH INTEGRITY › WOVEN WITH QUALITY › CRAFTED TO INSPIRE

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FAR-WEST TEXAS UPDATE

8-7-26

FAR-WEST TEXAS



SARAGOSA, TX



SARAGOSA, TX



EL PASO VALLEY



EL PASO VALLEY



Far-West Texas is progressing well and remains on schedule. The crop has reached 24–26 total nodes and is currently at 5—6 nodes above bloom, placing it at peak bloom.

Over the next few weeks, the crop should begin transitioning to cutout, with the first open bolls expected soon thereafter.

So far, no major issues have been reported, and growers appear to be keeping pace with irrigation demands despite the challenging conditions.

Continued irrigation management during this critical period will be essential to maintaining fruit retention and maximizing yield potential.

EST. 2018

PIMA PERSPECTIVE SERIES

INSIGHT. INTELLIGENCE. INFLUENCE.

WEEK ENDING
AUGUST - 2026

Beyond Fiber

How Quality, Traceability and Trust Are Redefining the Future of Premium Cotton

By Rick Neuenschwander
PRESIDENT & CEO,
PIMA GROWERS / PCIA



> We don't just market a fiber—
> we govern its use.
>
> — Marc Lewkowitz,
> PRESIDENT & CEO, SUPIMA®

For decades, premium cotton competed primarily on fiber quality. Today, that equation is changing. Consumers increasingly expect products to prove where they came from, how they were produced, and why they deserve a premium. As global brands embrace traceability and governments tighten sourcing regulations, documented trust may become just as valuable as the fiber itself.

The New Currency of Premium Cotton

Longer fiber. Stronger by nature. Superior by design.

To the average consumer, softness may seem like a subjective impression. Within a spinning mill, however, softness is engineered long before a garment reaches a retail shelf.

American Pima belongs to the Extra-Long Staple (ELS) category, producing fibers typically measuring between 1⅛ and more than 1¼ inches. Those additional fractions of an inch fundamentally change the way yarn is manufactured. Longer fibers create more uniform yarns, reducing weak points and allowing mills to spin finer counts with greater consistency.

The result is improved efficiency on the spinning floor, fewer yarn breaks during production, and fabrics that maintain ꞁ the appearance through repeated wear and laundering.

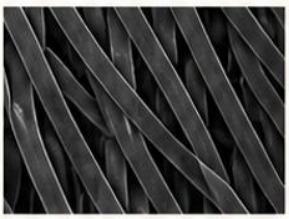
"The functional and aesthetic case for SUPIMA has always been strong," says Marc Lewkowitz. "What's changing is the ecosystem around it."

That ecosystem now extends well beyond the physical properties of the fiber istelf. Quality remains essential, but increasingly it must be accompanied by documentation, verification, and transparency.

AMERICAN PIMA VS. CONVENTIONAL COTTON

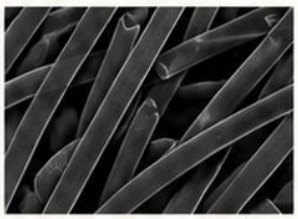
CHARACTERISTIC	AMERICAN PIMA (ELS)	CONVENTIONAL COTTON
Staple Length	Extra-long	Shorter
Yarn Quality	Finer, more uniform	Less uniform
Pilling Resistance	Less pilling	More pilling
Strength	Superior strength	Lower strength
Dye Retention	Vibrant colors	Fades sooner
Garment Life	Longer lasting	Shorter life
Comfort	Softer hand feel	Less soft

FIBER LENGTH (MICROSCOPIC VIEW)



AMERICAN PIMA COTTON

Longer, stronger, more uniform fibers



CONVENTIONAL COTTON

Shorter, more varied fibers

From Reputation to Verification

The evolution of trust in cotton.

For generations, premium cotton relied on reputation. Brands asked consumers to trust labels, marketing campaigns, and longstanding perceptions of quality.

That model is rapidly disappearing.

Today, consumers increasingly expect proof. They want to know where products originate. They want to understand how fibers move through global supply chains. They expect sustainability claims to be supported by measurable evidence rather than promotional language.

According to Lewkowitz, this shift fundamentally changes the role of certification.

"Trust us," he observes, "is no longer sufficient. Instead, the conversation has become "Verified."

That philosophy lies at the center of SUPIMA's AQRē™ platform, which combines digital chain-of-custody technology with forensic fiber authentication to document every stage of the product's journey—from American farm to finished garment.

THE EVOLUTION OF TRUST IN COTTON

Pre-2000s
FIBER QUALITY
Premium cotton competed on physical characteristics and reputation.

2000s
CERTIFICATION ERA
Third-party certification emerged to assure quality and origin.

2010s
DIGITAL TRACEABILITY
Technology enabled visibility across more of the supply chain.

2020s
AQRē™ PLATFORM
Digital chain-of-custody + forensic authentication create verified trust.

THE FUTURE
PRODUCT PASSPORT
Complete transparency from farm to consumer.

> "For the first time, premium cotton can demonstrate its story rather than simply tell it."
>
> — Marc Lewkowitz

AQRe™ and the Power of Provenance

Traceability that changes outcomes.

AQRe™ answers those questions with data, not assumptions.

Each bale of SUPIMA® cotton is assigned a unique identity and tracked through every partner in the supply chain. Independent audits, transaction records, and fiber testing ensure that what begins in the field is what finishes in the garment.

This level of verification is becoming essential. Regulatory frameworks such as the Uyghur Forced Labor Prevention Act (UFLPA) are changing how companies assess and manage sourcing risk.

Lewkowitz notes that many brands now view verified sourcing as a risk–management strategy and a competitive advantage.

> Verification is not just about compliance—it's about building confidence that begins in the field and lives through the finished product.
>
> — Marc Lewkowitz



WHY THIS MATTERS FOR BRANDS

PROTECT REPUTATION
Verified sourcing reduces exposure to supply chain risk and negative publicity.

STRENGTHEN LOYALTY
Transparency builds consumer confidence and deeper brand loyalty.

MEET REGULATORY REQUIREMENTS
Verification helps ensure compliance with evolving domestic and global regulations.

CREATE DIFFERENTIATION
Documented quality and traceability allow brands to stand apart in a crowded marketplace.

The Journey: From Farm to Consumer

A transparent supply chain. A trusted outcome.



For American Pima, that trend represents an important competitive advantage. The fiber's inherent physical characteristics have not changed. What has changed is the marketplace's willingness to reward them.

In a world of claims, verification is the new luxury.

> In a world of claims, verification is the new luxury.
>
> — Marc Lewkowitz

What This Means for American Pima

Beyond fiber lies the future.

The global textile industry is changing. Premium cotton's future will be defined by more than physical quality.

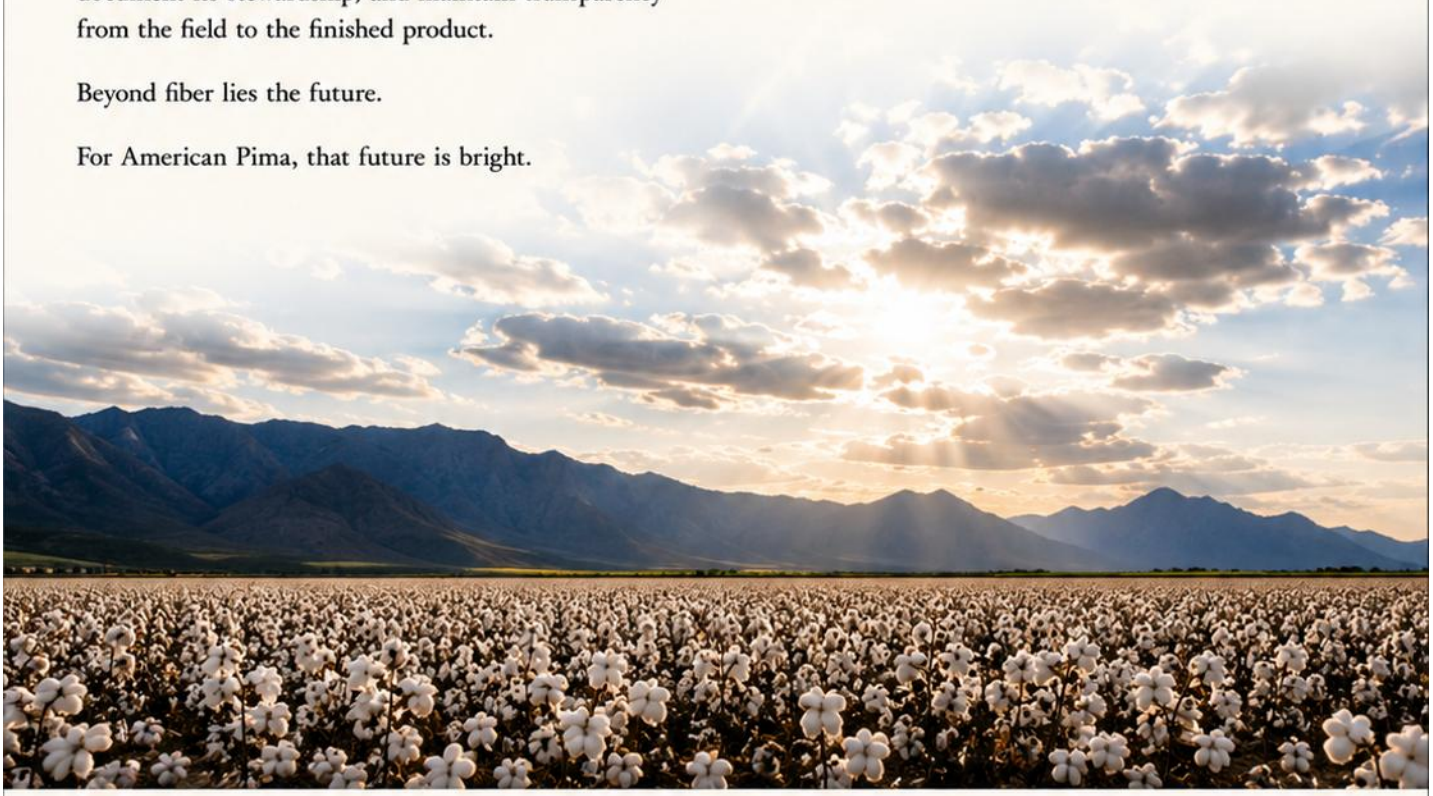
For American Pima growers, the opportunity is clear. Our fiber's exceptional, our production practices are among the most sustainable in the world. Our reputation is earned and enduring.

Now, with verification technologies and digital transparency, our story can be proven at every step. The future will reward those who not only produce exceptional fiber—but who can prove its origin, document its stewardship, and maintain transparency from the field to the finished product.

Beyond fiber lies the future.

For American Pima, that future is bright.

> "Premium cotton's future will be written by those who can prove their promise."
>
> — Marc Lewkowitz



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AMERICA'S FINEST COTTON

THE PIMA FIELD AND MARKET JOURNAL

Connecting Growers, Markets and Consumers with the World's Finest Cotton

EST. 2018





TRANSPARENCY & SUPIMA AUTHENTICITY

AUTHENTICITY

The Supima AQRe™ Project (pronounced "acre"), stands for Authenticity, Quality and Responsibility.

TRANSPARENCY

It is the industry's pioneering end-to-end traceability, transparency, and authentication platform that will provide Supima brand/retail partners true product credibility and insights.

ACCOUNTABILITY

It will proactively serve as a collective response to current and anticipated future market and regulatory challenges. We have established a new standard of trust with the ability to now track and verify SUPIMA® fiber, from the point of origin to point of purchase, facilitating the real time, credible, and responsible sourcing of textiles made with Supima cotton.

Learn more at supima.com/aqre-project | SUPIMA® WORLD'S FINEST COTTONS | Building trust. Delivering confidence. From Our Fields to the World.®



SUPIMA® WORLD'S FINEST COTTONS

The World's Finest Cotton. By Design.

SUPERIOR FIBER. SUPERIOR OUTCOMES.

"Supima is a fully integrated downstream value system. Today, measured American Pima bale consumption is already embedded in global retail programs. Our responsibility now is to scale that system with discipline, safeguard its credibility, and translate proven retail performance into consistent, forecastable demand for American Pima."

WORLD'S FINEST FIBER

Extraordinary length, strength, softness and color—naturally superior American Pima cotton.

CERTIFIED. TRUSTED.

Supima® certification ensures authenticity, quality and traceability from field to fiber.

INTEGRATED. TRANSPARENT.

A fully integrated value system that connects growers, mills, brands and consumers.

RESPONSIBLE. SUSTAINABLE.

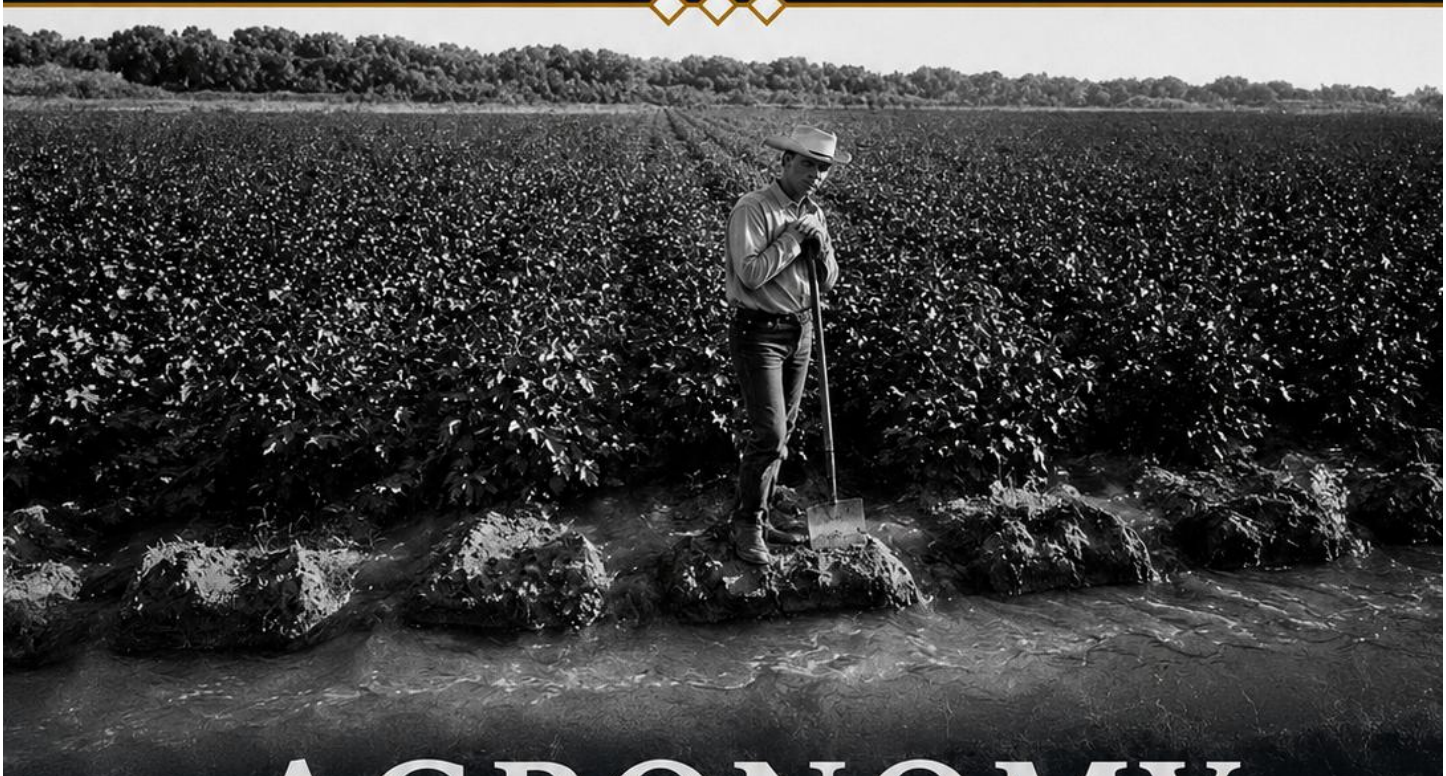
Built on stewardship, science and continuous improvement for people and the planet.

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Practical Knowledge. Proven Practices. Profitable Results.

SOIL HEALTH & FERTILITY

IRRIGATION MANAGEMENT

NUTRITION STRATEGIES

PEST & DISEASE MANAGEMENT

VARIETY PERFORMANCE

YIELD OPTIMIZATION

Better Decisions in the Field. Better Results at the Gin.

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What Is Extra-Long Staple (ELS) Cotton?

American Pima cotton belongs to the Extra-Long Staple (ELS) category—the premium segment of the global cotton industry.



LESS THAN **1%** OF GLOBAL COTTON PRODUCTION

USDA DEFINITION

To qualify as ELS cotton under USDA standards, cotton must be:

1. *American Pima.*
2. All other varieties of the *Barbadense* species of cotton, and any hybrid thereof; and
3. Any other variety of cotton in which one or more of these varieties predominate.

✓ Produced in the United States and ginned on a *roller gin*.

WHY IT MATTERS

Extra-Long Staple cotton represents less than 1% of global cotton production yet commands premium value due to:

- LONGER FIBER LENGTH
- SUPERIOR STRENGTH
- GREATER UNIFORMITY
- IMPROVED SOFTNESS & DURABILITY
- PREMIUM SPINNING PERFORMANCE

AMERICAN PIMA COTTON • THE WORLD'S FINEST COTTON

Source: USDA Cotton Program Definitions

GOWAN COTTON COMPANY

HYBRID PIMA SOLUTIONS

COTTON THAT SELLS LIKE A PIMA. YIELDS LIKE AN UPLAND.

Gowan Hybrid Pima combines the yield potential and adaptability growers demand with the Extra-Long Staple fiber quality premium markets reward.

GOWAN 1432

- ✓ Earlier maturity than traditional Pima
- ✓ High seedling vigor and strong plant growth
- ✓ Improved water-use efficiency
- ✓ Tolerance to alkaline and saline soils
- ✓ ELS fiber quality
- ✓ Non-GMO hybrid technology
- ✓ Proven performance across California, Arizona, New Mexico, and Texas

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AgLogic®
Proven Maximum Performance



Broad-spectrum insect, mite and nematode protection for American Pima cotton.

BROAD-SPECTRUM PROTECTION

AgLogic provides broad-spectrum control of key early-season threats including insects, mites and nematodes. It helps protect emerging plants and supports a strong start that sets the stage for higher yield potential.

EARLY VIGOR & EARLINESS

AgLogic supports improved early plant development, promoting stronger root growth and faster canopy establishment. This early vigor can help lead to improved earliness and more efficient season-long growth.

YIELD & FIBER QUALITY

By reducing early pest pressure, AgLogic helps plants stay healthier, longer—supporting maximum yield potential and high-quality fiber that meets the standards of American Pima growers.

KEY BENEFITS

BENEFIT	GROWER IMPACT
Insect Control	Strong early-season protection against damaging insects
Mite Control	Reduced plant stress and improved plant health
Nematode Control	Improved root development and nutrient uptake
Early Vigor	Faster and more uniform plant establishment
Earliness	Potential for earlier maturity and more flexible harvest timing
Yield Potential	Stronger plants and higher yield potential

Always read and follow label directions.

Supporting American Pima Growers From Emergence Through Harvest.

AgLogic continues to provide cotton producers with reliable, broad-spectrum protection that helps maximize yield potential and fiber quality from the very beginning of the season.



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AgLogic®
Proven Maximum Performance

TRUSTED. EFFECTIVE. DEPENDABLE.
SOLUTIONS THAT HELP GROWERS SUCCEED.

STEWARDS OF THE LAND. PRODUCERS OF THE WORLD'S FINEST COTTON.

TRANSPARENT. TRACEABLE. AMERICAN GROWN.

CERTIFIED SUPIMA® BUILT ON TRUST.

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WEST TEXAS FIELD REPORT

ON-THE-GROUND INSIGHTS FOR WEST TEXAS GROWERS

Real-time observations. Local intelligence. Better decisions.

WEEK ENDING
AUGUST 7, 2026

VOL. 8 ◆ ISSUE 51



IRRIGATION IS DEFINING THE 2026 CROP

Irrigated acres retain meaningful yield potential as water availability becomes the dividing line.

Across the Texas High Plains, the difference between a cotton crop with potential and one nearing abandonment can be as little as the width of a county road.

Late-July and early-August rainfall provided scattered relief, but amounts were highly variable and most moisture was quickly consumed. Now, as cotton moves through peak bloom and toward cutout, irrigation capacity—not simply rainfall—is determining which fields will finish strong.

Fields with adequate irrigation are sustaining fruit loads and boll development. Nearby dryland cotton—and even irrigated acres with limited pumping capacity—are increasingly short, stressed and running out of time.

Irrigation Capacity Is Separating the Crop

- Southeast Lubbock County: Cotton under approximately four-gallon irrigation is performing well at peak bloom, covering much of the crop's daily water needs.
- Near Levelland: A two-gallon drip field is performing relatively well but irrigation alone is falling short of peak crop demand.
- Near Slaton: Lightly irrigated cotton with about 5.2 inches of rainfall since planting is holding on but will need additional moisture to finish.
- Crosby & Floyd Counties: Well-irrigated fields continue to show good potential while nearby dryland acres deteriorate rapidly.
- North of Lubbock (Petersburg & Plainview): Dryland cotton is extremely short, already blooming out the top in many fields. Near Petersburg, a severely stressed dryland field sits almost directly across the road from productive irrigated cotton—a striking reminder of what water means in 2026.

Water Allocation Decisions

Even among irrigated acres, producers are being forced to make difficult decisions about where limited water can do the most good.

- In Floyd County, water is being diverted from a lower-potential pivot to a field with better yield prospects.
- In the Panhandle, some producers are shifting irrigation away from severely stressed corn toward cotton with greater remaining potential.

These decisions reflect a balancing act as water supplies are stretched across multiple crops.

Dryland Window Is Closing

A Swisher County field planted behind wheat fallow is still hanging on, but without additional rainfall its prospects are fading quickly.

By the latter half of August, even an inch of rain is likely to be too late to materially change the outcome for the most stressed dryland acres.

August Rain Still Matters

Timely rainfall can still provide substantial benefit to irrigated cotton by:

- Supplementing declining well capacity
- Reducing irrigation costs
- Providing the moisture needed to finish developing bolls

For adequately irrigated cotton, that combination could preserve meaningful yield potential.

IRRIGATED-ACRE WATCH

HIGHER CAPACITY
Peak-bloom cotton remains productive where irrigation can cover a meaningful share of crop demand.

LIMITED CAPACITY
Two-gallon and lightly irrigated fields remain viable but increasingly depend on supplemental rainfall.

WATER ALLOCATION
Producers are prioritizing irrigation toward fields and crops with the greatest remaining economic potential.

RAINFALL VALUE
August rainfall can still materially improve irrigated cotton prospects by supplementing wells and helping finish developing bolls.

PIMA GROWERS INTERPRETATION

The Texas High Plains still has good cotton, particularly on adequately irrigated acreage. But total planted or even total irrigated acres may increasingly overstate effective production potential in 2026. The critical question is becoming how many irrigated acres have enough water capacity to carry the crop through boll development.

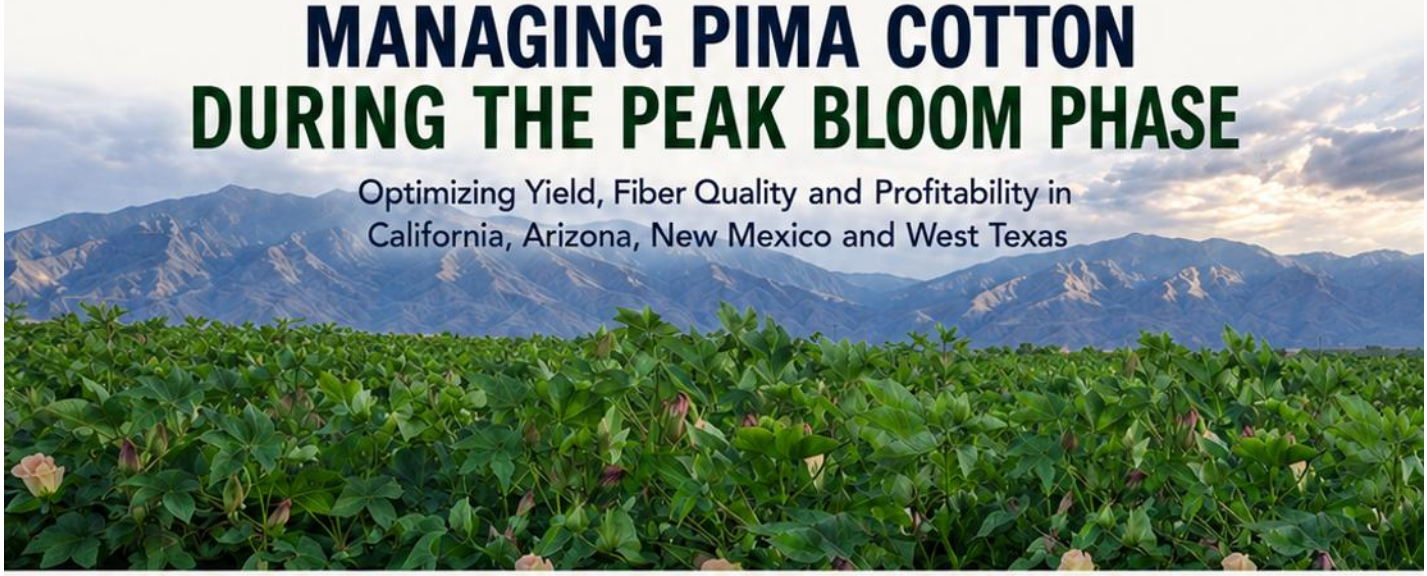
The 2026 crop is not finished yet, but for a growing portion of the region, the next rain—and the next irrigation decision—may determine whether there is a crop left to harvest.

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MAY 30, 2025 | VOL. 51 | ISSUE 10

MANAGING PIMA COTTON DURING THE PEAK BLOOM PHASE

Optimizing Yield, Fiber Quality and Profitability in California, Arizona, New Mexico and West Texas



EXECUTIVE SUMMARY

Peak bloom is the single most important management period of the Pima cotton season. During this three- to four-week window, the crop reaches maximum water demand, nutrient uptake, and fruiting potential while simultaneously becoming most vulnerable to heat stress, insect injury, and excessive vegetative growth. Decisions made during this period largely determine final lint yield, extra-long staple (ELS) fiber quality, micronaire, staple length, and ultimately grower profitability.

WHY PEAK BLOOM DETERMINES PROFITABILITY

Peak bloom represents the transition from canopy development to boll production. Nearly every premium fiber characteristic is established during this period. Stress imposed now cannot be recovered later in the season. Environmental stress during peak bloom commonly results in:

- Square abortion and young boll shed
- Reduced lint turnout and lower yield
- Shorter staple length
- Lower fiber strength and quality
- Delayed maturity

REGIONAL PERSPECTIVE

Although all four regions face extreme heat and high evaporative demand, timing of bloom and pest pressure can vary.



CALIFORNIA
Early bloom begins in late April in the San Joaquin Valley. High Lygus pressure common.



ARIZONA
Bloom typically begins in early May. Intense heat events require precise irrigation management.



NEW MEXICO
Bloom occurs mid to late May. Watch for bolilworm migrations from the south.



WEST TEXAS
Bloom timing varies by irrigation source and planting date. Stink bugs are a major concern.

WHAT MAKES PIMA DIFFERENT FROM UPLAND?

- More strongly indeterminate growth habit
- Higher baseline vegetative vigor
- More sensitive to moisture and heat stress
- More attractive to insects
- Greater sensitivity to fruit abortion

PIMA GROWERS INTERPRETATION

Peak bloom is where Pima cotton earns its premium. Water, fertility, growth regulation, and insect management must work together to preserve first-position fruit and maintain continuous fiber development. No single input determines success, rather, profitability depends on disciplined weekly measurement and timely adjustments.

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WATER OPTIMIZATION DURING PEAK ET

Water demand reaches its seasonal maximum once the canopy closes. Across western irrigated production systems, daily crop evapotranspiration (ET_c) typically ranges from 0.28 to 0.35 inches per day.

When irrigation fails to replace crop water use, canopy temperatures rise rapidly. Once canopy temperatures exceed approximately 90°F, pollen viability declines and flower abortion accelerates. Under prolonged conditions above 100°F, fruit shed can become severe.

Unlike Upland cotton, Pima exhibits relatively poor recovery following severe moisture stress. Fiber elongation occurring during the first three weeks after flowering is particularly sensitive to water deficits. Maintain uniform soil moisture throughout peak bloom.



DAILY ET REQUIREMENTS BY REGION (INCHES PER DAY)

Growth Stage	California (CIMIS)	Arizona (AZMET)	New Mexico (Climate Station)	West Texas (Mesonet)	Key Risk
Early Bloom (First 7–10 days)	0.22 – 0.27	0.24 – 0.28	0.21 – 0.26	0.20 – 0.26	Square loss
Peak Bloom (Next 14–21 days)	0.28 – 0.35	0.28 – 0.34	0.26 – 0.33	0.26 – 0.33	Fiber length reduction
Late Bloom (Last 7–10 days)	0.24 – 0.30	0.24 – 0.30	0.22 – 0.28	0.22 – 0.28	Premature cutout

IRRIGATION SCHEDULING BEST PRACTICES

- Schedule irrigations using real-time ET calculations.
- Use CIMIS, AZMET, West Texas Mesonet or regional weather stations.
- Replace nearly 100% of crop ET during peak bloom.
- Avoid irrigation delays that permit visible wilting.
- Minimize irrigation intervals during extended heat events.

TISSUE SAMPLING SCHEDULE

- Begin weekly sampling at first bloom.
- Collect uppermost fully expanded leaf or petiole.
- Sample at the same time each week.
- Use consistent lab and interpretation.
- Act on deficiencies immediately.

NUTRIENT DEMAND DURING PEAK BLOOM

As boll numbers increase, root growth slows while nutrient demand accelerates. Nitrogen supports photosynthesis, but excess promotes rank growth. Potassium is critical for boll retention, fiber strength and lint turnout.

NITROGEN MANAGEMENT

- Maintain adequate nitrogen to support the boll load and leaf area.
- Avoid excessive late nitrogen that stimulates vegetative regrowth.
- Split applications or fertigation preferred.
- Target total in-season N based on yield goal, soil tests and irrigation source.

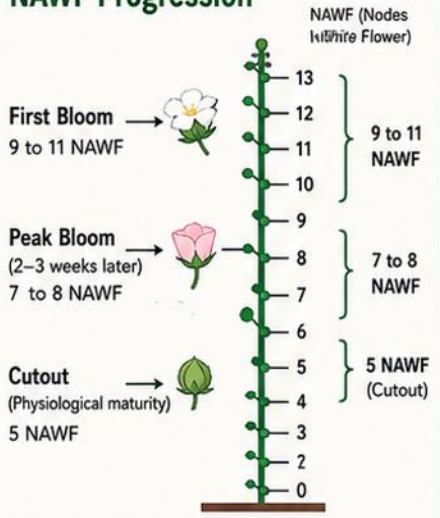
POTASSIUM MANAGEMENT

- Potassium demand increases rapidly during boll set and fiber elongation.
- Deficiency causes leaf drop, lower turnout and wilt vulnerability.
- Use foliar potassium nitrate (1–2 lbs K_2O/acre) when tissue levels decline.
- Maintain adequate soil K fertility.

MANAGEMENT CHECKLIST

- ☑ Replace daily ET throughout bloom.
- ☑ Monitor tissue nutrients every week.
- ☑ Measure NAB, HNR and MID every 7 days.
- ☑ Apply PGRs only when growth exceeds target thresholds and moisture is adequate.
- ☑ Scout insects every 3–4 days during peak bloom.
- ☑ Base insect termination on DD60 accumulation after cutout.

Growth Milestones & NAWF Progression



NAWF = Nodes Above White Flower

Source: TAMU

MANAGING PLANT ARCHITECTURE

Excessive vegetative growth reduces sunlight penetration, delays boll opening, decreases spray coverage and encourages insects. Insufficient growth limits photosynthetic capacity and reduces yield potential. Use these three measurements to manage crop vigor and guide PGR decisions.

KEY GROWTH METRICS

Measurement	Target During Peak Bloom	What It Indicates
NAWF (Nodes Above White Flower)	7 – 8 at peak bloom	Indicates plant vigor and helps predict fruit retention and cutout timing.
Height-to-Node Ratio (HNR) (inches/node)	2.0 – 2.45 inches/node	Indicates cumulative seasonal vigor (total height ÷ total nodes).
Maximum Internode Distance (MID) (inches)	2.5 – 3.5 inches	Indicates recent vegetative growth over the last 10–14 days.

MANAGEMENT BASED ON NAWF AT PEAK BLOOM

NAWF at Peak Bloom	Interpretation	What It Means	Recommended Action
Above 8–9 NAWF	Excessive vegetative vigor	The plant diverts energy away from boll load, reducing fruit retention potential.	Use a PGR (e.g., mepiquat chloride) to reduce vegetative growth.
7 to 8 NAWF	Ideal balance	Optimal balance of fruit retention and mainstem growth.	Maintain program. Continue monitoring.
Below 6 NAWF	Premature stress	Stress (drought, heat, or severe nutrient limitation) is pushing the crop toward early cutout.	Address stress cause. Do not apply PGR.

INTERPRETING GROWTH METRICS

HNR (in/node)	MID (inches)	NAWF (nodes)	Interpretation	Recommended Action
< 2.0	< 2.5	> 8–9	Low vigor	No PGR. Check fertility, moisture and salinity.
2.0 – 2.45	2.5 – 3.5	7 – 8	Balanced growth	Maintain program. Continue monitoring.
> 2.45	> 3.5	> 8–9	Excess vigor risk	Consider PGR. Evaluate fruit retention and moisture.
> 2.45	> 3.5	≤ 6	Rank growth + rapid cutout	Aggressive PGR program may be needed.

SEQUENTIAL PIX PROGRAMS (GUIDELINES)

- First Application: 10–14 days after first bloom.
- Second Application: 14 days after the first application.
- Rate: Follow label. Typical Pix rate range 4–8 fl oz/acre.
- Adjust rate based on vigor, retention and environment.
- Use good coverage (10–15 GPA minimum).

WHEN NOT TO APPLY PGRs

- Moisture stress or drought stress.
- Salinity stress.
- Poor stand or disease stressed fields.
- Immediately before or after extreme heat events.
- When fruit retention is poor.

MANAGING PIMA COTTON DURING THE PEAK BLOOM PHASE

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PROTECTING YIELD DURING PEAK BLOOM

First-position fruit contributes up to 80% of total lint yield. Protect these bolls!

WESTERN LYGUS BUG MANAGEMENT (CA & AZ)



- Primary economic pest in California and Arizona.
- Punctures squares and young bolls causing abortion and stained lint.
- Thresholds (adjust for nymphs):
  - Arizona: 15 total (≥4 nymphs) per 100 sweeps
  - California: 7–10 total per 50 sweeps
- Scout fields thoroughly—especially field edges.

STINK BUG MANAGEMENT (WEST TEXAS)



- Green and brown stink bugs puncture bolls.
- Check internal boll injury.
- Treatment threshold: 10–15% internal boll injury with active bug present.
- Focus scouting on upper canopy and field edges.

BOLLWORM MANAGEMENT



High-pressure egg laying during bloom requires frequent scouting.

- Scout every 3–4 days during peak bloom.
- Check squares, white flowers and developing bolls.

Use economic thresholds for treatment decisions.

INSECT CONTROL TERMINATION

Continue chemical protection until the crop reaches physiological maturity rather than a calendar date.

Once the crop reaches 450–500 DD60 heat units beyond physiological cutout (5 NAB), the harvestable boll population has generally accumulated sufficient maturity to withstand additional insect feeding with minimal economic loss.

Tracking DD60 provides consistent termination timing across all western Pima production regions.

WEEKLY SCOUTING & MANAGEMENT CALENDAR

Week (Bloom)	Key Priorities
Week 1 (First Bloom)	• Verify irrigation and ET replacement • Tissue tests (N, K, B, Zn) • Establish insect baseline (sweep samples)
Week 2	• Evaluate PGR need (check HNR, MID, NAB) • Continue intensive insect scouting • Maintain irrigation uniformity
Week 3	• Repeat tissue tests (focus on K) • Prepare for cutout • Monitor DD60 accumulation
Week 4	• Approach cutout (5 NAB) • Protect remaining bolls • Plan insect control termination based on DD60

FIVE PRINCIPLES OF SUCCESSFUL PEAK BLOOM MANAGEMENT

1. Never allow moisture stress.
2. Feed the developing boll load—not excessive vegetative growth.
3. Measure plant growth every week (NAB, HNR, MID).
4. Protect first-position fruit aggressively.
5. Base insect termination on DD60 after cutout rather than calendar date.

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COTTON IRRIGATION MANAGEMENT GUIDE

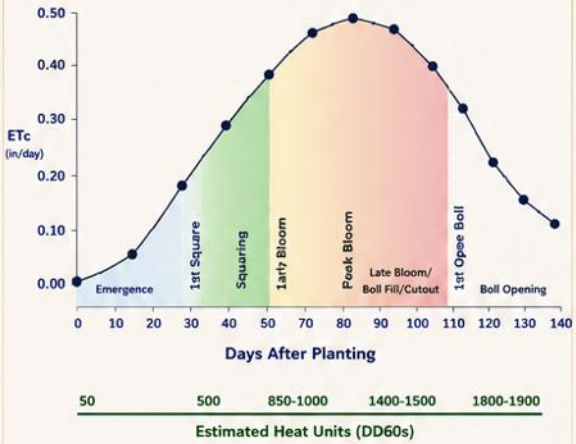
WATER SMART. YIELD STRONG.

Understanding Crop Water Use and Matching It with Your Irrigation System for Maximum Efficiency

1. SEASONAL COTTON WATER USE CURVE

Cotton water use follows a predictable pattern throughout the growing season. The highest demand occurs from early bloom through peak bloom. Proper irrigation during this period is critical for protecting yield potential and fiber quality.

TYPICAL SEASONAL CROP WATER USE CURVE (FAO-56 STYLE)



Water demand increases rapidly through bloom and peaks at peak bloom. Protect adequate soil moisture in the root zone during this critical period to support boll retention, yield potential, and fiber quality.

2. IRRIGATION SYSTEM CAPACITY GUIDE

Match your irrigation system's capacity and application efficiency to crop water demand. Higher efficiency delivers more water to the root zone and reduces waste.

PUMPING CAPACITY DELIVERED TO CENTER PIVOT						IN/ACRE/DAY DELIVERED AT IRRIGATION APPLICATION EFFICIENCY (%)		
						95	85	75
GPM	GPM/ ACRE	GAL/ DAY	ACRE-FT/DAY	ACRE-IN/DAY	AT 100% EFFICIENCY	(LEPA, SDI)	(LOW ELEVATION SPRAY)	(POOR SPRAY)
100	0.8	144,000	0.44	5.3	0.04	0.04	0.04	0.03
200	1.7	288,000	0.88	10.6	0.09	0.08	0.08	0.07
300	2.5	432,000	1.33	15.9	0.13	0.13	0.11	0.10
400	3.3	576,000	1.77	21.2	0.18	0.17	0.15	0.13
500	4.2	720,000	2.21	26.5	0.22	0.21	0.19	0.17
600	5.0	864,000	2.65	31.8	0.27	0.25	0.23	0.20
700	5.8	1,008,000	3.09	37.1	0.31	0.29	0.26	0.23
800	6.7	1,152,000	3.53	42.4	0.35	0.34	0.30	0.27
900	7.5	1,296,000	3.98	47.7	0.40	0.38	0.34	0.30
1000	8.3	1,440,000	4.42	53.0	0.44	0.42	0.38	0.33

3. MATCHING WATER USE TO SYSTEM CAPACITY

GROWTH STAGE	DD60 RANGE	TYPICAL ETc (IN/DAY)	TARGET APPLIED (IN/DAY)*	RECOMMENDED SYSTEM CAPACITY**
Emergence	0 – 50	0.05 – 0.08	0.05 – 0.10	100 – 200 GPM
Square	50 – 500	0.08 – 0.20	0.10 – 0.25	200 – 400 GPM
First Bloom	500 – 850	0.20 – 0.35	0.25 – 0.40	400 – 700 GPM
Peak Bloom	850 – 1000	0.35 – 0.50	0.40 – 0.55	600 – 1000 GPM
Boll Fill	1000 – 1400	0.30 – 0.45	0.35 – 0.50	500 – 900 GPM
Open Boll	1400 – 1800	0.20 – 0.30	0.25 – 0.35	300 – 600 GPM
Boll Opening	1800 – 1900+	0.10 – 0.15	0.10 – 0.15	200 – 400 GPM

* Target applied depth should account for your irrigation application efficiency.
** Higher end of range for lower efficiency systems.

4. KEY MANAGEMENT GUIDELINES

Irrigate for the critical window.
Early bloom through peak bloom is the most important period for adequate soil moisture.

Match system capacity to demand.
Ensure your system can deliver required water during peak demand periods.

Maximize application efficiency.
Invest in proper nozzles, pressure, and maintenance to get more water in the root zone.

Monitor soil moisture.
Use soil moisture probes, ET data, and plant indicators to guide irrigation timing.

Adjust for conditions.
Consider weather forecasts, soil type, crop stage, and field variability when scheduling irrigation.

PROTECT YIELD. PROTECT FIBER QUALITY.

Proper irrigation management during peak water demand is the single most important factor you can control to protect boll retention, maximize yield, and produce high quality American Pima cotton.

FORMULA REFERENCE

DD60 Calculation: [(min Tmax, 86) + (max Tmin, 60)] / 2 – 60

- Base Temperature: 60°F
- Upper Temperature Cap: 86°F
- Accumulate daily from planting to track heat unit progress

EST. 2018

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AGRONOMY SERIES



The Cotton Countdown Clock

Using DD60 Heat Units and Nodes Above White Flower (NAWF) to Maximize American Pima Yield

By Rick Neuenschwander, CEO, Pima Cotton Improvement Association

Every successful American Pima crop follows two biological clocks simultaneously. One measures thermal time, expressed as accumulated DD60 heat units, while the other measures physiological maturity, expressed as Nodes Above White Flower (NAWF). Individually, each provides valuable information. Together, they create one of the most powerful management tools available for producing high-yield, premium-quality Pima cotton.

DD60 heat units quantify how rapidly the crop develops in response to temperature, while NAWF measures how much productive flowering remains before the plant naturally reaches cutout. Understanding how these two measurements work together allows growers to anticipate crop development, optimize irrigation timing, improve nutrient management, and protect yield potential during the most critical weeks of the season.

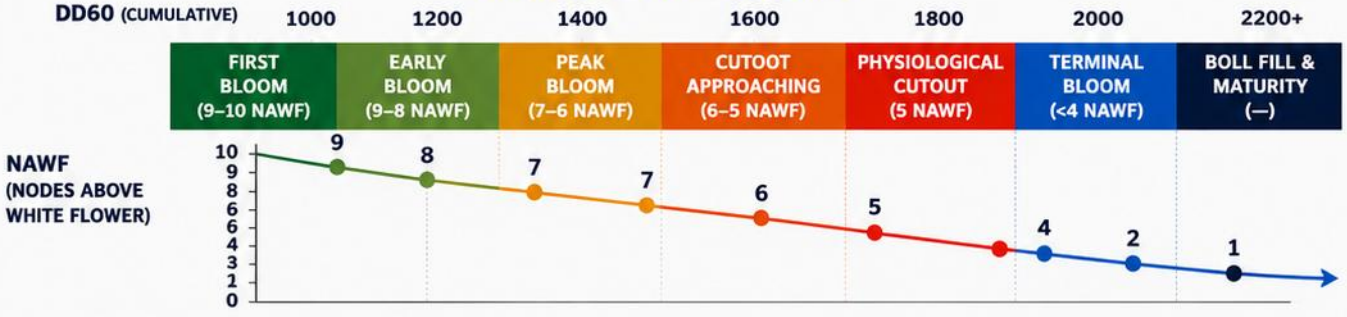
TWO CLOCKS, ONE CROP.

Cotton development is driven by accumulated heat. Each day the crop accumulates DD60 heat units, it progresses through vegetative growth, flowering, boll development, and ultimately maturity. Heat units provide an objective measure of where the crop should be based on environmental conditions.

NAWF measures something entirely different. Rather than indicating how far the crop has progressed, NAWF measures how much productive growth remains. Each week after first bloom, the uppermost white flower moves closer to the terminal acā its energy toward filling developing bolls.

Think of the two measurements this way:
DD60 measures the season.
NAWF measures the crop.

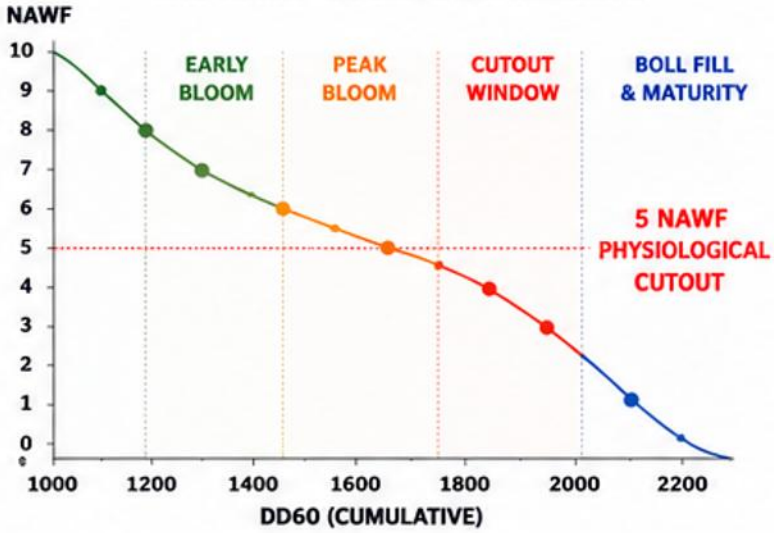
THE COTTON COUNTDOWN CLOCK
DD60 ↔ NAWF TIMELINE



DD60 / NAWF BENCHMARK GUIDE

GROWTH STAGE	NAWF	APPROX. DD60 (CUMULATIVE)	PRIMARY PLANT ACTIVITY	MANAGEMENT FOCUS
First Bloom	9–10	1,050 – 1,150	Flower initiation while vegetative growth continues rapidly.	Establish reproductive growth. Maintain irrigation and nutrient availability.
Early Bloom	9–8	1,150 – 1,300	Rapid node production; squares and blooms increasing.	Protect square retention and avoid stress.
Peak Bloom	7–6	1,300 – 1,500	Maximum boll set and carbohydrate demand.	Highest water and fertility demand. Avoid moisture deficits.
Cutout Approaching	6–5	1,500 – 1,650	Vegetative growth slowing significantly.	Evaluate irrigation efficiency and final fruit load.
Physiological Cutout	5	1,650 – 1,750	End of effective flowering. Vegetative growth ceases.	Shift management focus to boll filling.
Terminal Bloom	<4	1,750 – 1,900	Energy directed to existing bolls; little new fruit viable.	Manage late-season irrigation and protect fiber quality.
Boll Fill & Maturity	—	1,900 – 2,300+	Fiber elongation and boll maturation.	Finish crop efficiently and prepare for harvest.

THE NAWF COUNTDOWN CURVE



NAWF declines predictably as DD60 heat units accumulate.
5 NAWF marks the end of effective flowering.

KEY PHYSIOLOGICAL STAGES

EARLY BLOOM (9–8 NAWF)
- New nodes forming rapidly
- Protect square retention
- Maintain consistent moisture
- Support nutrient uptake

PEAK BLOOM (7–6 NAWF)
- Maximum boll set
- Highest water use
- Greatest stress sensitivity
- Determines yield potential

PHYSIOLOGICAL CUTOUT (5 NAWF)
- End of effective flowering
- Vegetative growth ceases
- Transition to boll filling focus
- Protect fruit already set

TERMINAL BLOOM (<4 NAWF)
- All energy to existing bolls
- Fiber elongation and fill
- Finish crop efficiently
- Protect fiber quality

PIMA GROWERS INSIGHT

DD60 measures how much of the season has accumulated. NAWF measures how much productive flowering remains.

When these two measurements agree, crop development is on track. When they diverge, it often signals stress, excess vegetative growth, or delayed maturity—giving growers the opportunity to make timely adjustments before yield potential is lost.

MANAGEMENT TAKEAWAYS

- Protect square retention during 9–8 NAWF.
- Never allow moisture stress during 7–6 NAWF.
- Begin transition planning at 6–5 NAWF.
- Shift irrigation toward boll filling after cutout.
- Finish the crop efficiently to preserve fiber quality.


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The Bed Is Made. The Business Isn't.

Robert Antoshak

Managing Partner, Gherzi Americas | Four Decades in Textiles & Apparel | Sourcing, Trade Policy & Market Strategy | Traceability & Trade Risk | Industry Writer & Commentator

August 1, 2026

The U.S. home textile sector sells products found in nearly every household, yet it operates as though demand were optional. Let me explain. Sheets, towels, pillows, curtains and kitchen linens are necessities, but consumers rarely replace them with urgency. Most purchases follow a life change, such as a move, a renovation, a wedding, a college departure, or the final collapse of something that should have been discarded years earlier.

That's a difficult starting point. The industry sells durable products to customers trained to wait for discounts. Retailers want novelty, lower prices, faster deliveries and cleaner supply chains, usually all at once. Suppliers are expected to carry the inventory, finance the development, eat the disruptions, and keep the ticket price where it was.

Home Textiles Isn't the Apparel Business

I've worked across apparel and home textiles for four decades, and the biggest mistake I see is treating them as the same industry. Apparel runs on fashion. Style regenerates demand every season, whether or not anyone needs another shirt, and the whole machine, from trend forecasting to markdown cadence, exists to make last year's purchase feel old. Home textiles has no such engine. A

white sheet doesn't go out of style. Demand renews only when something wears out or life changes, which is why the category leans so hard on the housing market.

The supply chains differ just as much. Apparel is cut-and-sew work that chases labor costs from country to country; the industry moved from China to Vietnam to Bangladesh and elsewhere during my career, and it will move again. Home textiles is capital: terry looms and continuous dye ranges anchored near the cotton. That's why sheets and towels concentrated in India and Pakistan and stayed, because an apparel program can pick up and move but a spinning and weaving complex is bolted to the floor.

The category spent thirty years borrowing apparel's playbook, with constant promotion and assortments churned to look fresh. Promotion without a fashion engine merely moves the same replacement purchase to a lower price. And tariff-driven sourcing shifts that work for a t-shirt program make no sense for terry, because there's no next cheap country with the looms already running. The future of home textiles belongs to whoever stops running someone else's playbook.

Housing Isn't Providing Much Help

The market isn't cooperating. June housing starts rose sharply, according to the Census Bureau and HUD, but most of the gain came from multifamily construction. Single-family starts were flat and permits declined. The National Association of Realtors reported existing-home sales fell 2.4 percent in June, with pending sales down 5.4 percent. Owners holding mortgages written at 3 percent won't trade them for loans at twice the rate, so they stay where they are.

That lock-in effect reaches the linen closet. A household that stays put may buy a towel or pillowcases, but it isn't furnishing a house. The sector is left trying to create excitement around products consumers believe are still good enough.

The Price Squeeze Is Getting Worse

The category faces an awkward form of inflation. Operating costs remain elevated while retail prices for basic linens move the other way. The June Consumer Price Index from the Bureau of Labor Statistics put household furnishings and supplies up 1.3 percent from a year earlier, with prices for other linens down 6 percent.

There's only so much cost that can be removed from a towel or sheet before the customer notices. Pick up the five-dollar towel on a holiday endcap and you can feel where it went: thinner hand, a third less cotton than the one it replaced. A chemical finish supplies softness that won't survive many trips through the dryer. The shelf price looks attractive, but the product wears faster and reinforces the idea that home textiles are disposable.

Deflation warps the math upstream, too. When the shelf price falls 6 percent while labor, freight, compliance and financing costs hold or rise, the difference comes out of somebody's margin, and it's rarely the retailer's. A little comes back through volume, though seldom enough, and the mills and converters absorbing the gap have fewer dollars left for the development work retailers keep requesting.

The Industry Has Made Quality Hard to See

Quality in home textiles is real, but the industry never gave consumers the vocabulary for it. Thread count became the language for sheets because it fit on a package, and it says little about how a sheet performs. Fiber quality, yarn size, weave, finishing, shrinkage and durability matter as much or more, but those things take explaining, and nobody explains anything on a hangtag.

Towels face the same problem. Weight, absorbency, drying time, linting and wash durability separate a good towel from a mediocre one, and none of it shows up in a product photo. Online, towels and sheets appear as folded rectangles.

Digital retail widened access but flattened the market. Home textiles are tactile products sold through a screen, so every listing promises hotel quality and cloud-like softness, and once everything sounds exceptional, shoppers fall back on the one difference they can verify from the couch: price. The digital shelf has unlimited space. Consumer attention doesn't.

Retail Has Shifted the Risk

Suppliers are asked to maintain inventory closer to the customer, shorten lead times, fund testing and packaging changes, accept chargebacks and respond when forecasts miss. The list grows every season, and nothing on it arrives with a price adjustment.

A hit gets copied within a season. A weak one brings markdown requests and receipts that quietly slide to the right. Nobody calls to discuss a chargeback; it shows up as a deduction on the remittance, and the accounting clerk finds it first. The supplier is expected to act as manufacturer, bank, warehouse and insurance policy.

The arrangement works until it doesn't. Suppliers with options walk away from the worst programs, and suppliers without options cut corners to survive, which feeds the quality problem the industry already has. Risk that moves in one direction long enough eventually removes the people who were supposed to hold it.

Import Dependence Can't Be Reversed by Slogan

Data from the Commerce Department's Office of Textiles and Apparel show how heavily the United States relies on imported home textiles, and that dependence has a history. When the quota system ended in 2005, production concentrated where mills had spent decades building integrated capacity, and American plants closed by the dozen, Pillowtex among them, taking tens of thousands of jobs. The towels went to India and Pakistan, where one mill campus takes raw cotton to finished product without it leaving the property. Nobody moves a towel program by finding a cheaper sewing line. The whole chain has to come along, and nothing comparable exists here anymore.

Tariffs and freight disruptions can change the arithmetic quickly, but domestic production isn't an automatic substitute. U.S. mills can compete where speed, customization, institutional demand or government procurement provide an advantage. They struggle when asked to duplicate the cheapest import without comparable scale.

The domestic mills that still weave terry and sheeting survive on committed volume: hospital laundries, hotel programs that pay for speed, military contracts under the Berry Amendment, and not much else. That's what a workable strategy looks like, and it runs on purchase orders measured in years. A modern weaving room costs tens of millions and has to run around the clock to earn its keep. No mill will make that bet because a retailer expressed passing interest in American sourcing.

Sustainability Needs a More Honest Argument

Sustainability has been reduced to paperwork. A supplier shipping to five retailers can face five questionnaires asking the same questions in different formats, then OEKO-TEX testing and cotton traceability files to satisfy the Uyghur Forced Labor Prevention Act. Whatever platform each customer adopted last quarter wants its own data on top. Much of that work is worthwhile, but none of it is free, and smaller suppliers carry the same load as billion-dollar companies with a fraction of the staff. The cost rolls downhill, and whether the consumer will pay for any of it remains an open question.

The industry also ducks the hard trade-offs. A lighter towel uses less material and wears out sooner. Recycled fiber cuts virgin inputs while making consistency harder to hold, and a water-saving finishing line takes capital the factory can't recover without dependable volume.

An honest argument would start with durability. A sheet used for a decade carries a lighter footprint than three replacements shipped across the Pacific, whatever the label says about fiber content. The

industry won't make that case, because doing so would mean admitting how much of the current assortment was engineered to be replaced.

Where Value Comes Back

The sector won't disappear. People will continue sleeping, bathing, cooking and covering windows. The question is whether the industry can make a reasonable return meeting those needs, and the best answer hides inside the sustainability argument: durability, sold as value. A towel that survives two hundred washes is worth more than one that pills after twenty, and the difference can be measured, then printed on the package in words a customer uses. It's a harder sell than a promotional price, but it's the one claim whoever ships the lighter towel can't copy. Retailers who stock genuine differences instead of six versions of the same discounted item give that claim room to work.

Suppliers have a part to play, and it starts with saying no. Price the chargebacks into the quote or decline the program. The healthiest suppliers I know have shifted their weight toward hospitality, healthcare, senior living and other institutional markets, where the buyer pays for reliability instead of chasing the lowest sticker, and they let the worst retail programs go to whoever still wants them.

For years, the sector kept making its products cheaper and lighter until everything looked interchangeable. It trained consumers to wait for the sale and retailers to demand another concession. That protected volume. It also stripped the value out of the category. The bed is made. The harder job is building a business that can afford to lie in it.

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WEEK ENDING
AUG 7, 2026
VOL. 8 ◆ ISSUE 47

What This Means for American Pima Cotton

QUALITY. DURABILITY. DIFFERENTIATION.

THE FUTURE OF HOME TEXTILES IS BUILT ON VALUE.



Executive Summary

Robert Antoshak's analysis of the U.S. home textile sector highlights an industry that has spent decades competing on price rather than value. While the article focuses on towels, sheets, and household textiles, its implications extend directly to American Pima cotton. For Pima growers, the long-term opportunity is not found in producing the lowest-cost fiber—it is found in supplying the highest-value fiber to manufacturers and retailers that compete on durability, performance, sustainability, and product longevity rather than promotional pricing.

The Home Textile Industry Is Searching for Differentiation

Unlike apparel, home textiles do not benefit from rapidly changing fashion trends. Consumers purchase bed linens and towels infrequently, replacing them only when products wear out or major life events occur. This creates an environment where retailers have increasingly relied on discounting to stimulate demand.

Unfortunately, years of price competition have produced lighter fabrics, lower-quality cotton, shorter product life, and shrinking margins throughout the supply chain.

For American Pima cotton, this trend presents both a challenge and an opportunity.

- **The challenge** is obvious: premium fibers become difficult to justify when the market is conditioned to purchase solely on price.
- **The opportunity** is even greater. As manufacturers search for meaningful product differentiation, fiber quality once again becomes one of the few characteristics competitors cannot easily replicate.

Premium Fiber Creates Measurable Consumer Value

Many of the quality attributes consumers seek in luxury bedding originate long before fabric is woven. American Pima cotton delivers:

- Longer fiber length
- Greater yarn strength
- Improved spinning efficiency
- Superior fabric smoothness
- Better color retention
- Increased resistance to pilling
- Longer product life after repeated laundering

These characteristics directly address many of the shortcomings Antoshak identifies in today's commodity home textile market.

When manufacturers compete on durability instead of promotional pricing, premium cotton becomes a competitive advantage rather than simply a higher input cost.

Durability Is Becoming a Sustainability Story

Perhaps the most important insight from the article is the changing definition of sustainability.

Consumers increasingly hear about recycled fibers, certifications, traceability, and environmental reporting. Yet one of the most sustainable products may simply be one that lasts significantly longer.

A towel that maintains performance through hundreds of wash cycles requires fewer replacements, consumes fewer manufacturing resources over its lifetime, and ultimately generates less waste.

This aligns exceptionally well with American Pima cotton.

KEY TAKEAWAYS

Premium quality is becoming more valuable than low price. As retailers seek differentiation, American Pima's superior fiber characteristics become increasingly important.

Durability is emerging as a sustainability metric. Longer-lasting products reduce replacement frequency and strengthen the environmental case for premium cotton.

Institutional markets represent growth opportunities. Hospitality, healthcare, and government buyers reward performance over lowest initial cost.

Traceability strengthens competitive positioning. Verified U.S. production and transparent supply chains align with evolving sourcing requirements.

The future of American Pima lies in value creation—not commodity competition. The industry's greatest opportunity is helping brands demonstrate why premium fiber delivers measurable performance that consumers can experience and trust.

Institutional Markets May Become Increasingly Important

Antoshak notes that many successful textile manufacturers are shifting toward institutional markets such as hospitality, healthcare, luxury hotels, government procurement, and senior living.

These customers purchase based on lifecycle cost rather than initial purchase price. Products that maintain appearance, strength, softness, and durability through repeated commercial laundering create measurable economic value.

These are precisely the markets where premium fibers such as American Pima can command sustainable price premiums.

Supply Chain Transparency Favors American Pima

The article also discusses the growing complexity of traceability, sustainability reporting, and responsible sourcing requirements.

While these compliance requirements create additional costs, they also reward transparent supply chains.

American Pima producers already operate within one of the world's most traceable cotton production systems, supported by:

- U.S. production standards
- Modern farming practices
- Documented supply chains
- High environmental stewardship
- Strong regulatory oversight

Retail Has Shifted the Risk

Suppliers are asked to carry inventory closer to the customer, shorten lead times, fund testing and packaging changes, accept chargebacks, and respond when forecasts miss.

A hit gets copied within a season. The winner today becomes the baseline tomorrow.

This dynamic puts constant pressure on margins and diverts resources away from innovation and long-term product quality improvement.

The Long-Term Outlook

The American Pima industry should resist competing with commodity cotton on price alone. Instead, the future lies in reinforcing the value proposition that premium fiber creates throughout the supply chain:

- Higher manufacturing efficiency
- Longer-lasting finished products
- Greater consumer satisfaction
- Improved sustainability through durability
- Stronger premium brand positioning

Retailers can always discount another commodity towel. They cannot easily duplicate fiber performance that begins in the field.

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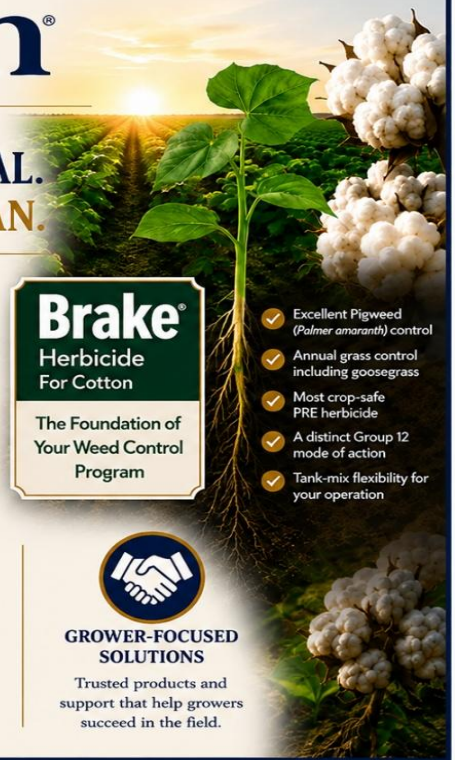
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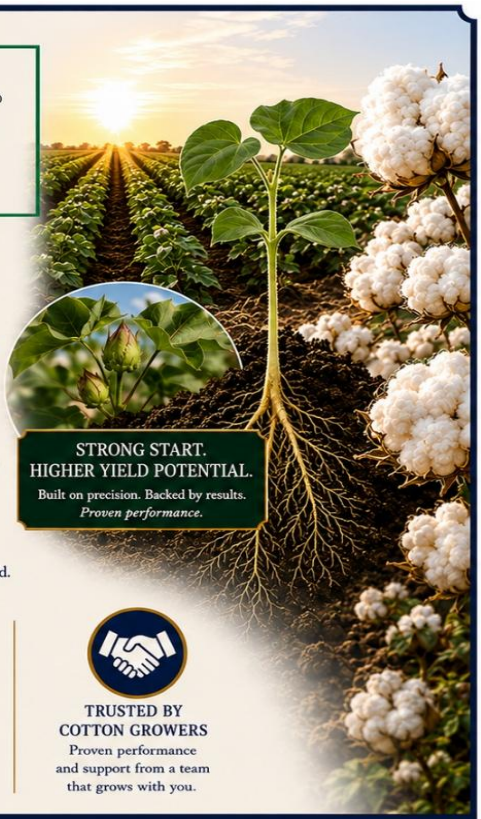
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- GROWER OWNED COOPERATIVE
- PREMIUM FIBER QUALITY & GENTLE HANDLING
- STATE-OF-THE-ART EQUIPMENT
- INTEGRITY, SERVICE & COMMUNITY FOCUSED

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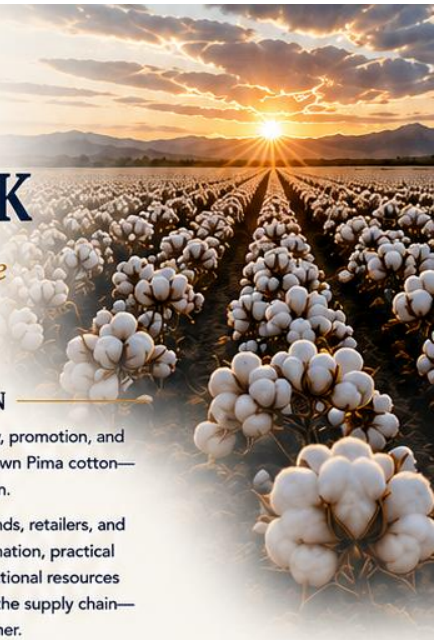
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To advance the production, profitability, promotion, and long-term sustainability of American-grown Pima cotton—the world's finest cotton.

We serve growers, industry partners, brands, retailers, and consumers by providing credible information, practical research, market intelligence, and educational resources while fostering collaboration throughout the supply chain—from field to fiber to consumer.

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- Strengthening the future of American Pima cotton

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