THE PIMA FIELD & MARKET JOURNAL

EST. 2018

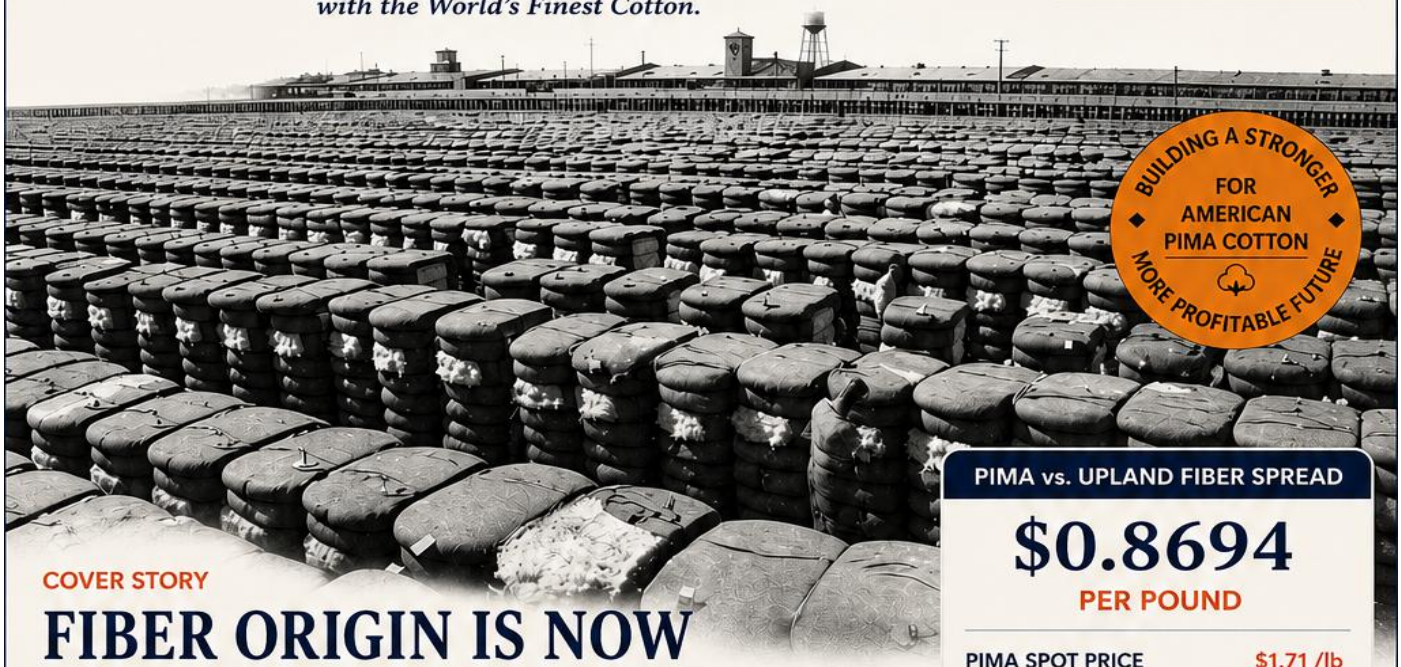
PIMA GROWERS

AMERICA'S FINEST COTTON

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

WEEK ENDING
AUGUST 14, 2026

VOL. 8 ISSUE 49



COVER STORY

FIBER ORIGIN IS NOW THE NEW TRADE FRONTIER

Why Traceability, Transparency and Verification Matter More Than Ever

As global demand for responsibly sourced cotton accelerates, fiber origin has become a defining factor in market access, brand trust, and premium pricing. This in-depth analysis explores the technologies, standards, and strategies shaping the future of fiber origin verification—and what it means for Pima growers.

PIMA vs. UPLAND FIBER SPREAD

$0.8694

PER POUND

PIMA SPOT PRICE	$1.71 /lb
UPLAND SPOT PRICE	$0.8406 /lb

PIMA PREMIUM OVER UPLAND

103.4%

Premium Pima price advantage remains strong and well above the 5-year average spread of $0.8200 per pound.

Source: Trading Economics, 8-14-26

FEATURED IN THIS ISSUE



FIBER ORIGIN IS NOW THE NEW TRADE FRONTIER
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STATE OF AMERICAN PIMA: FIBER VALUE DASHBOARD
PAGES 8–9



GLOBAL MARKET INTELLIGENCE DASHBOARD
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USDA AUGUST 2026 PIMA COTTON UPDATE
PAGE 14



COTTON THERMAL STRESS SUMMARY
PAGE 18



BEYOND FIBER
PAGES 23–28

THIS WEEK

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

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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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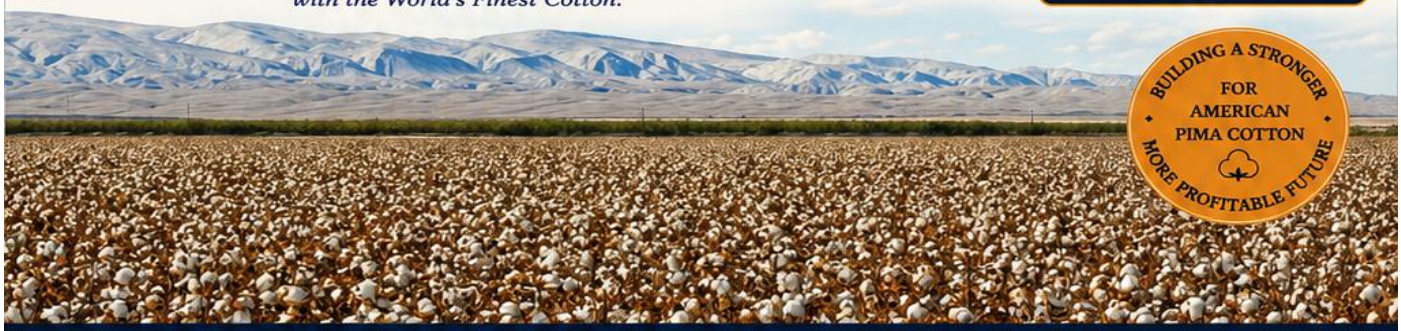
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THE PIMA PERSPECTIVE

AMERICAN PIMA: AUGUST USDA UPDATE STRENGTHENS THE SUPPLY OUTLOOK

By Rick Neuenschwander
CEO | Pima Cotton Improvement Association (PCIA) • Pima Growers

The 2026 American Pima crop is entering cutout across much of the Southwest. Arizona and West Texas are moving through this transition under better moisture in some areas following sustained heat and high irrigation demand. From this point forward, management shifts from building the crop to protecting what has already been established — maintaining boll retention, supporting boll fill and preserving the fiber quality that ultimately determines value.

The August USDA update provides an important new benchmark for the crop. USDA increased its 2026 American Pima production estimate to 399,000 bales, up from the May estimate of 388,000 bales. The increase reflects both a larger harvested-acre estimate and improved yield expectations. Harvested area is now estimated at 144,800 acres, while average yield is projected at approximately 875 pounds per acre.

USDA also increased projected American Pima exports to 305,000 bales, compared with 297,000 bales in the May estimate. That increase is significant because the larger crop is being accompanied by stronger projected movement into the export market rather than simply accumulating in inventory. Ending stocks are projected at approximately 83,000 bales, leaving the stocks-to-use ratio near 31%.

That combination — 399,000 bales of production, 305,000 bales of exports and relatively contained ending stocks — is constructive for American Pima. The August numbers suggest additional production can be absorbed without fundamentally changing the premium-market structure that growers depend upon.

KEY TAKEAWAYS

- U.S. Pima production forecast at **399,000 bales**, down slightly from July but up 9% vs. 2025/26.
- Average yield projected at **1,333 lbs./acre**, up 116 lbs. from last year and well above the U.S. all-cotton average of 798 lbs.
- California leads with 310,000 bales (78% of total), followed by Texas (45,000), Arizona (28,000), and New Mexico (16,000).
- Strong yield potential and favorable conditions support a high-quality crop across the Pima belt.

USDA, AUGUST 2025 - 2025/26 PIMA COTTON PRODUCTION ESTIMATE

REGION	PLANTED ACRES ESTIMATE				HARV	YIELD	PROD
	2025/26 USDA MAY FINAL	2025/26 USDA MAR EST	2025/26 USDA JUN EST	2025/26 USDA AUG EST	Crop Estimate August 2025 Estimate Hvr Acres	Lbs.	Prod
PIMA	**142**	**130**	**150**	**148**	**144**	**1,333**	**399**
Arizona	16	15	15	15	15	896	28
California	92	80	95	95	94	1,583	310
New Mexico	13	15	15	10	10	792	16
Texas	21	20	25	28	25	864	45

Source: *Trucott USDA Summary, August 12, 2026*

American Pima does not compete primarily on volume. It competes on quality, consistency, traceability and value. The August USDA report gives the industry the opportunity for a larger crop; our responsibility now is to convert that production potential into the quality the market expects.

The opportunity is not simply to produce more Pima. It is to produce more Pima that deserves the premium.

EST. PIMA GROWERS 2018
AMERICA'S FINEST COTTON
WEEK ENDING 8-14-26

Fiber Origin Is Now the New Trade Frontier

How Traceability and Section 301 Tariffs Are Reshaping U.S. Cotton Textile & Apparel Imports in 2026

The rules of global textile trade have changed. It is no longer enough to assemble garments in a low-cost country, U.S. trade policy now follows the cotton fiber from the field to the finished product.

This 2026 Trade Matrix evaluates how raw cotton origin, traceability, and Section 301 tariffs are creating winners and losers in the U.S. import market. For American Pima growers, these policies shape demand for U.S.-grown fiber and the mills that depend on it.



US COTTON TEXTILE & APPAREL IMPORT TRADE MATRIX (2026)

SOURCING ORIGIN	COTTON SUPPLY CHAIN ADVANTAGE	PRIMARY COTTON/ TRACEABILITY CONSTRAINT	SEC 301 SURCHARGE	US MARKET CATEGORY	COMPETITIVE STATUS
Mexico	Zero-tariff entry for regional cotton under USMCA near-shoring framework.	Yarn-forward rule: Raw fiber, spinning, and weaving must occur within the bloc.	0% (Exempt)	Near-shore Hub	Maximum Strategic Advantage
Bangladesh	"US Cotton Clause" grants 0% base tariff if utilizing U.S.-grown raw cotton.	Strict document audit required; blending with regional fiber triggers 10% penalty.	10% (ART Rate)	Top 3 Supplier	Strategic Advantage
India	Vertically integrated chain from domestic lint to garment sewing. Benefits from removal of 11% domestic raw cotton import duty on premium ELS/Pima cotton.	Traceability is simple, but high domestic taxes on alternative synthetic blending limit flexibility.	10% (ART Rate)	Top 5 Supplier	Integrated Chain Advantage
Cambodia	Highly agile spinning/ sewing ecosystem with clean fabric import records.	Lacks domestic raw cotton crop; relies entirely on importing auditable yarn.	10% (Base)	Top 5 Supplier	Operational Advantage

SOURCING ORIGIN	COTTON SUPPLY CHAIN ADVANTAGE	PRIMARY COTTON/ TRACEABILITY CONSTRAINT	SEC 301 SURCHARGE	US MARKET CATEGORY	COMPETITIVE STATUS
Indonesia	Sophisticated domestic spinning mills producing premium combed cotton yarn.	100% import dependent for raw cotton lint; highly vulnerable to global crop price volatility.	10% (Base)	Top 7 Supplier	Stable / Moderate Position
Pakistan	Massive domestic raw cotton crop production and localized yarn infrastructure.	Severe domestic energy grid failures cripple spinning mills; high 12.5% penalty at U.S. customs.	12.5% (Max)	Top 7 Supplier	Surcharged / Vulnerable
Colombia	Duty-free baseline entry under TPA for qualifying regional cotton fiber garments.	12.5% surcharge erodes margins despite "yarn-forward" regional compliance.	12.5%	Regional FTA	Penalized Advantage
Vietnam	Premier high-efficiency garment manufacturing and advanced cut-and-sew capacity.	Deep reliance on Chinese cotton fabric imports, creating massive UFLPA audit friction.	12.5% (Max)	#1 by Value	Surcharged Disadvantage
China	Massive domestic cotton farming capacity and global yarn production dominance.	UFLPA border enforcement mandates a hard ban on any cotton traced to Xinjiang.	Up to 50% (Stacked)	#1 by Volume	Severe Disadvantage

Note: *Tariff rates reflect Section 301 actions in effect as of August 2026 and are subject to change.*
Source: *USTR, OTEXA, USDA, U.S. Customs, Company Reports, Industry Analysis (August 2026)*

EXECUTIVE SUMMARY

U.S. trade policy for finished cotton textiles and apparel is dictated by fiber-origin tracking, not just country-of-origin assembly. Standard import tariffs are overlaid with a selective Section 301 forced labor surcharge framework (0% to 12.5%—and up to 50% in certain cases). This matrix shifts financial advantages away from low-cost manufacturing bases and toward regions that can mathematically prove their raw cotton inputs did not violate global labor standards.

MAJOR ASIAN COTTON PROCESSORS: THE VERTICAL VS. IMPORT-DEPENDENT DIVIDE

- **The Vertically Verifiable (India & Pakistan):** India thrives with a fully domestic cotton system and removal of its 11% import duty on premium ELS/Pima cotton. Pakistan is penalized by energy grid failures and the highest U.S. tariff penalty (12.5%).
- **The Strategic Importers (Bangladesh & Indonesia):** Bangladesh leverages the "US Cotton Clause" for zero base tariff if using U.S. cotton. Indonesia maintains a 10% base rate through strict traceability.
- **The Chinese Cotton Dependency Trap (China & Vietnam):** China faces stacked tariffs up to 50% and a hard ban on Xinjiang cotton under UFLPA, which produces ~85% of China's crop. Vietnam's reliance on Chinese fabric creates frequent customs detentions.

LATIN AMERICA: THE REALITIES OF 'YARN-FORWARD' RULES

- **Mexico** remains the dominant near-shore destination with a 0% surcharge under USMCA—provided raw cotton is grown, spun, and woven within the bloc.
- **Colombia**'s duty-free FTA access is eroded by a 12.5% surcharge, narrowing its competitiveness against Asian suppliers.

WHAT THIS MEANS FOR AMERICAN PIMA

Traceability, transparency, and trust are now the price of entry. As mills navigate higher tariffs and audit risks, demand for fully verifiable U.S.-grown Pima cotton will continue to strengthen.

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MARKET INTELLIGENCE

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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.

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STATE OF AMERICAN PIMA®
FIBER VALUE DASHBOARD

Market Intelligence for the World's Finest Cotton®

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DASHBOARD SPONSOR CALCOT COTTON MARKETING SERVICES



WEEK ENDING AUG. 14TH, 2026

VOL. 8 ◆ ISSUE 55

AMERICAN PIMA COTTON THE WORLD'S FINEST COTTON®

Total commitments stand at 160.4K bales, up 72.3% YoY vs last week and ahead of the same week last year by 72.3%.

Premium vs. upland is +$0.8694/lb, well above the 5-year average.

Ending stocks are estimated at 101,000 bales as of Aug. 12, 2026.

Market fundamentals remain favorable for American Pima.

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	$1.8150 China
US Pima- Prior 5-year avg. Spot Price	$1.65
Upland Current- Spot Price	$0.8406
Upland-Prior 5-year avg. Spot Price	$0.8300
Pima/Upland Prior 5-year avg. price spread	$0.8200
Pima/Upland current price spread	$0.8694
Oil (WTI)	$82.378
PSF (Polyester Staple Fiber)	$0.51

Source: ICE Futures, USDA, PCIA, SunSirs, Trading Economics
Data as of Aug. 14, 2026

PIMA MONITOR

- Pima- 2026 acreage projection- 148,000.
  2025 acreage 142,000.
  2024 Acreage actual USDA 200,500.
- Pima- 2026 projection at 399,000 bales,
  2025 at 388,000 bales,
  2024 at 471,000 bales
- Pima- 2024/25 Ending Stocks est.
  101,000 bales as of 8-12-26

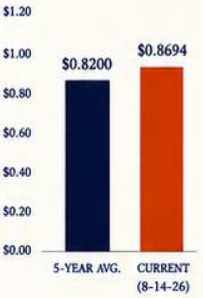
USDA Weekly Export Sales Report,

- 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, modestly higher 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.

PIMA/UPLAND PRICE SPREAD (LB.)



Current spread is well above the 5-year average.

SUPPLY SNAPSHOT

U.S. PIMA COTTON

METRIC	2024	2025 (EST.)	2026 (EST.)
Acreage (Acres)	200,500	142,000	148,000
Production (Bales)	471,000	388,000	399,000
Ending Stocks (Est.)	140,000	113,000	101,000

Source: USDA FAS, PCIA Estimates
Ending stocks estimate as of Aug. 12, 2026.

DEMAND SNAPSHOT (2026/27 CROP)

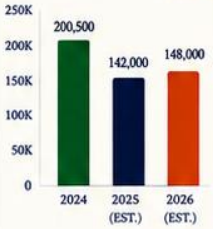
EXPORT COMMITMENTS ('000 RB)

METRIC	CURRENT	LAST YEAR SAME WEEK	YOY CHANGE
Total Commitments	160.4K	93.1K	+72.3%
Net Sales (Week 1)	50.6K	—	—
Weekly Exports	6.0K	4.5K	+1.5K
Shipped to Date	3.8%	12.9%	-9.1 pts
Unshipped Commitments	154.3K	—	—
Top Commitment Market	India (65.9K RB)	—	—

Source: USDA FAS Export Sales Report • Data as of Aug. 6, 2026.

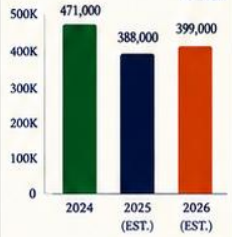
ACREAGE TREND

U.S. PIMA COTTON ACRES ↓ -26.1% VS 2024



PRODUCTION TREND

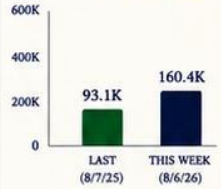
U.S. PIMA COTTON (BALES) ↓ -15.3% VS 2024



EXPORT COMMITMENTS TREND

AMERICAN PIMA COTTON ('000 RB) RUNNING BALES

↑ +72.3% VS LY SAME WEEK



USDA WEEKLY EXPORT SALES REPORT

WEEK 1 – ENDING AUG. 6, 2026

- Net sales of 50.6k bales.
- 2026/27 forward sales of 50.6k bales.
- Weekly exports of 6.0k bales (down 0% vs last week).
- Total commitments reached 160.4k bales.
- Commitments are up 72.3% vs last week and ahead of last year by 72.3%.

Source: USDA FAS Export Sales Report
Data as of Aug. 6, 2026.

WEEK 1 NEW SALES BY MARKET

(NET NEW BUSINESS)

India	21.9
Colombia	6.8
Italy	3.8
Pakistan	3.5
Vietnam	2.8
All Other	11.8
TOTAL	50.6

WEEK 1 EXPORTS BY MARKET

k RB

India	3.7
Egypt	1.1
All Other	1.2
TOTAL	6.0

PIMA MONITOR (SUPPLY OUTLOOK)

PIMA COTTON SUPPLY SNAPSHOT

- Pima – 2026 acreage projection: 148,000 acres
- 2025 acreage: 142,000 acres
- 2024 acreage (actual USDA): 200,500 acres
- Pima – 2026 production: 399,000 bales
- 2025 production: 388,000 bales
- 2024 production: 471,000 bales
- 2024/25 Ending Stocks est.: 101,000 bales as of 8-12-26
- Commodity Prices: Trading Economics

FORWARD BOOK MONITOR (2026/27 CROP)

160.4K BALES

+67.3K BALES YoY

(+72.3% YoY)

CURRENT SPREAD

$0.8694

5-YEAR AVERAGE

$0.8200

WHAT WE ARE WATCHING

- Reduced acreage limits supply.
- Production forecast reduced to 399,000 bales.
- Tight supply outlook continues.
- Export commitments ahead of last year.
- Premium trends 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.

USDA

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

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PIMA GROWERS.

AMERICA'S FINEST COTTON

STATE OF AMERICAN PIMA
FIBER VALUE DASHBOARD

BENCHMARKING AMERICAN PIMA AGAINST COMPETING FIBERS

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

PUBLISHED BY PCIA ◆ PRESENTED BY PIMA GROWERS

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Source: ICE Futures, USDA, PCIA, SunSirs, Trading Economics
Data as of Aug. 14, 2026

ELS LANDED SE ASIA PRICE COMPARISON

Current Market Prices (USD per lb)



AMERICAN PIMA TRADES AT A PREMIUM OF

+$0.8694/LB

OVER COMMODITY UPLAND COTTON

($1.71 – $0.8406 PER LB)

RELATED FIBER & COMMODITY MARKETS

COMMODITY	CURRENT	WOW CHANGE	TREND
COTTON (CTZ26) *ICE Futures*	$0.8471	+3.44%	↑
POLYESTER STAPLE FIBER (PSF) *SunSirs*	$0.51	-2.00%	↓
WTI CRUDE OIL NYMEX	$82.378	+1.50%	↑

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

LONG STAPLE PREMIUM RATIO BENCHMARK

BENCHMARK	RATIO
CURRENT	203%
5-YEAR AVERAGE	199%
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- 148,000. 2025 acreage 142,000. 2024 Acreage actual USDA 200,500.
- Pima- 2026 projection at 399,000 bales, 2025 at 388,000 bales, 2024 at 471,000 bales
- Pima- 2024/25 Ending Stocks est. 101,000 bales as of 8-12-26

ACREAGE & PRODUCTION CHANGE

2024 ➡ 2026 CHANGE

ACREAGE	PRODUCTION
↓ -26.1%	↓ -15.3%

Declining acreage and production continue to support strong premium fundamentals.

PREMIUM TAKEAWAY

The strongest development this week was the exceptionally strong opening to the 2026/27 marketing year. Week-one net sales reached 50.6K RB, lifting total commitments to 160.4K RB — 72.3% above last year's 93.1K RB at the same point.

Combined with historically tight supply, 101,000-bale ending stocks, and a current Pima/Upland spread of $0.8694/lb, American Pima fundamentals remain constructive and continue to support a strong premium environment.

AMERICAN PIMA FIBER VALUE SIGNAL



The Long Staple Premium Ratio of 203%, maintains the five-year average of 199%, reflecting continued strength in American Pima's premium value proposition. Acreage is aligned to decline 26.1% and production -15.3% 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: 199% RECENT NORMAL RANGE: 135% – 140%

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



FORWARD BOOK MONITOR (2026/27 CROP)

160.4K BALES

+67.3K BALES YoY

(+72.3% YoY)

CURRENT SPREAD

$0.8694

5-YEAR AVERAGE

$0.8200

USDA WEEKLY EXPORT SALES REPORT

WEEK 1 – ENDING AUG. 6, 2026

- Net sales of 50.6k bales.
- 2026/27 forward sales of 50.6k bales.
- Weekly exports of 6.0k bales (down 0% vs last week).
- Total commitments reached 160.4k bales.
- Commitments are up 72.3% vs last week and ahead of last year by 30.2%.

Source: USDA FAS Export Sales Report
Data as of Aug. 6, 2026.

WEEK 1 NEW SALES BY MARKET (NET NEW BUSINESS)

India	21.9
Colombia	6.8
Italy	3.8
Pakistan	3.5
Vietnam	2.8
All Other	11.8
TOTAL	50.6

WEEK 1 EXPORTS BY MARKET

India	3.7
Egypt	1.1
All Other	1.2
TOTAL	6.0

DEMAND SNAPSHOT (YoY) k RB

Total Commitments	160.4
Last Year Same Week	93.1
YoY Change	+72.3%
Shipped to Date	3.8%
Unshipped Commitments	154.3

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 1 · Ending August 6, 2026 · MY Aug 2026 – Jul 2027 · Week 1

MY 2026/27 opens with authority: 50.6k bales of week-one sales lift the opening book to 160.4k — 72% ahead of last year's start

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

NET SALES	WEEKLY EXPORTS	TOTAL COMMITMENTS	SHIPPED TO DATE	25/26 CARRYOVER
50.6 k RB	**6.0** k RB	**160.4** k RB	**3.8** %	**47.0** k RB
▲ 51.0 26/27 wk 1	▲ 1.0 vs 5.0	▲ 72.3% YoY LY 93.1	6.0 of 160.4 · LY 12.9%	— unshipped of 495.5k final

THIS WEEK IN THE MARKET

The new year opened with its strongest first week in the data. New sales of 50.6k RB landed in week one — on top of the 109.7k forward book carried in — putting opening commitments at 160.4k, 72.3% ahead of the 93.1k booked at the same point last year. India alone added 21.9k, opening at 65.9k committed: 2.3× its year-ago position.

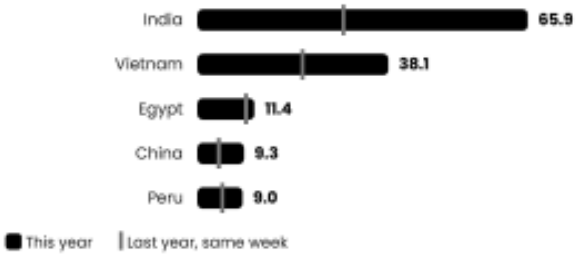
The buyer list broadened immediately. Beyond India, week-one business came from Colombia (6.8k), Italy (3.8k), Pakistan (3.5k) and Vietnam (2.8k) — early new-crop coverage from mills well outside the anchor market, with essentially no cancellations.

The old crop wrapped up cleanly. MY 2025/26 closed at 495.5k committed and 448.6k shipped (90.5%) after a final 1.2k wrap-up week; 47.0k of old-crop obligations remain to deliver. New-year shipments opened at 6.0k RB, led by India (3.7k) and Egypt (1.1k).

- An opening book of 160.4k RB, +72% YoY, is the strongest start to a marketing year in this data — momentum carried straight through the rollover.
- India opens holding 41% of all commitments (65.9k) — concentration to watch as the year builds.
- Shipped-percent will lag early (3.8% vs 12.9% LY) — the book is simply 72% larger; week-one exports ran twice the required pace.

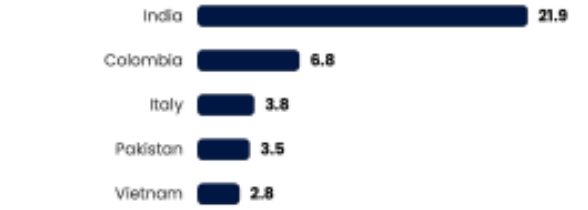
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



WEEK 1 NEW SALES BY MARKET

k RB, net new business



SEASON SHIPMENT PROGRESS

% of commitments shipped



Season outlook: 51 weeks remain. Outstanding sales of 154.3k RB require only ~3.0k/wk to clear — week one shipped 6.0k, twice that pace. The benchmark to beat: last season's 496.5k close.

SUPIMA AT DTC RETAIL — POWERED BY PARTICL

Particl DTC/e-commerce panel · market index "Supima" tag, monthly · brand cards: Supima-titled, weekly, wk ending Aug 8

The Supima index enters the new marketing year off its best non-holiday month on record (**July $18.4M**; TTM $204.7M). Nordstrom stabilized at **$1.17M, −4.4%** after two sale-driven swings — and Original Favorites quietly **raised its tee to $42.93 at zero discount**, a ~10% realized-price increase that held $79K in weekly volume.

Market Index

SUPIMA-TAGGED · 81 BRANDS



$205M TTM

1,177 tagged products, monthly. Top users: Nordstrom, Kohl's, Ariat, SPANX, Original Favorites. July $18.4M is the best non-holiday month on record.

Nordstrom OWN-LABEL SUPIMA® · 123 SKUS



$1.17M

▼ 4.4% WoW

25,612 units

Post-Anniversary stabilization; the plus-size Supima LS crew is the week's top seller as fall sets in across 123 active SKUs.

Top Products

SUPIMA-TITLED · 30 DAYS

1	Supima LS Crewneck Tee — Nordstrom	$1,979K
2	4-Pack Supima® Briefs — Nordstrom	$881K
3	SS Cotton Supima Polo — Nordstrom	$782K

OF's full-price move (~10% higher realized) with volume holding is a licensee pricing-power signal worth repeating.

Sources & method: USDA FAS Export Sales Reporting, CWR, American Pima raw cotton, wk 1 ending 08/06/2026 (MY 26/27; old-crop wk-53 wrap-up reflected) · Particl retail estimates (modeled): market index = Supima-tagged; brand cards = Supima-titled, windows Aug 2–8 vs Jul 26–Aug 1. DTC/e-commerce panel only — major Supima users outside it are not reflected. Prior-year = USDA prev-MY columns.

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GLOBAL MARKET INTELLIGENCE DASHBOARD
OUTSIDE MARKETS INFLUENCING AMERICAN PIMA COTTON

WEEK ENDING
AUG. 14TH, 2026
VOL. 8 ◆ ISSUE 55

PRIMARY DATA SOURCES
TRADING ECONOMICS (End of Day, Aug. 14, 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)	$82.34	↑ RISING	Slight Tailwind
U.S. Dollar Index (DXY)	99.64	↓ FALLING	Positive
ICE Cotton No. 2 (US ¢/lb)	84.72	↑ RISING	Positive
Polyester Staple Fiber (PSF) = $0.51 USD/lb*	$0.51	— NEUTRAL	Neutral
Ocean Freight (FBX) (USD/40' container)	$3,686.50	↓ SOFTENING	Positive
U.S. 10-Year Treasury (%)	4.70%	↑ RISING	Slight Headwind
China Manufacturing PMI (Official)	49.2	↓ CONTRACTING	Slight Headwind
American Pima Landed Price Southeast Asia (USD/lb)	$1.86	↑ FIRMING	Positive

Note: All values represent market close Friday, Aug. 14, 2026.
* PSF conversion: RMB to USD using USD/CNY 7.17 (market close 8/14/26); 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)	→	Moderately 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)	Crude oil strengthened sharply during the week, with WTI rising above $82/bbl amid renewed geopolitical risk and concerns surrounding Middle East supply. Higher energy prices increase pressure on synthetic-fiber production and transportation costs.	Positive / Slight Tailwind
U.S. Dollar	The U.S. dollar weakened, with DXY closing near 99.64 and declining roughly 0.8% over the past month. A softer dollar improves the relative competitiveness of U.S. cotton in international markets.	Positive
Interest Rates	Treasury yields moved higher into the end of the week, with the U.S. 10-year reaching approximately 4.70%. Elevated yields remain a modest headwind for global financing, inventories and textile-sector working capital.	Slight Headwind
China Demand	China's official manufacturing PMI fell to 49.2, returning below the 50 expansion threshold. Weak domestic and external demand continues to signal caution for textile and apparel demand.	Slight Headwind
Freight Costs	Ocean freight remains well below earlier supply-chain peaks, supporting delivered U.S. cotton economics. Current freight conditions remain a modest positive for export competitiveness.	Positive

4. AMERICAN PIMA COMPETITIVE POSITION

COMPETITIVE DRIVER	CURRENT EFFECT	COMMENT
Oil Prices	Slight Positive / Tailwind	Higher energy costs increase pressure on petroleum-based synthetic fiber economics, improving cotton's relative position.
U.S. Dollar	Positive	Weaker dollar enhances export competitiveness.
Cotton/Pima Prices	Positive	Pima prices firming vs. upland and other long-staples.
Polyester (PSF)	Neutral	Stable PSF keeps synthetic costs neutral.
Ocean Freight	Slight Positive	Lower freight improves delivered cost position.
China Demand (PMI)	Negative / Primary Headwind	Weakening activity weighs on global textile orders.

OVERALL COMPETITIVENESS: MODERATELY POSITIVE —
A softer U.S. dollar, firm Pima values, higher energy costs and manageable ocean freight support American Pima's competitive position. Tight Pima supplies provide additional underlying support, while weak Chinese manufacturing and broader Asian textile demand remain the principal market headwinds.

5. CEO COMMENTARY

WEEKLY REVIEW
Markets closed the week with a moderately constructive backdrop for American Pima. Crude oil strengthened sharply, rising above $82 per barrel, while the U.S. dollar remained relatively soft and cotton strengthennd to 84.72¢/lb. Higher energy prices improve cotton's competitive position relative to petroleum-based synthetic fibers, although elevated Treasury yields remain a headwind. Asian textile demand remains the primary area of caution.

90-DAY OUTLOOK — INTERMEDIATE)
The intermediate outlook remains cautiously positive. Tight Pima supplies, a strong opening pace for 2026/27 export commitments, and firm cotton values provide support. A softer dollar would further improve U.S. export competitiveness. Key risks remain elevated interest rates, uncertainty in China and Asian textile demand, and continued volatility in energy markets.

LONG-TERM PERSPECTIVE — YOY
Long-term fundamentals remain constructive. Limited American Pima supplies, strong export dependence, premium fiber quality, traceability and U.S. production standards continue to support Pima's strategic position in the global premium-cotton market. The current supply structure leaves relatively little inventory cushion if export demand strengthens.

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 18	WASDE Report (Aug)	Supply & Demand
Aug 19	CPI Inflation (Jul)	Inflation / Rates
Aug 20	PPI Inflation (Jul)	Inflation / Rates
Aug 21	Retail Sales (Jul)	Consumer Demand
Aug 25	FOMC Meeting Minutes (Jul)	Interest Rates / Dollar

*Dates subject to change. All times Central.

SUPIMA WEEKLY EXPORT SALES REPORT
WEEK ENDING AUG. 6, 2026

- Net sales of -0.4k bales
- 2026/27 forward sales of 50.6k bales.
- Weekly exports of 5.0k bales (down 0% vs last week).
- Total commitments reached 160.4k bales.
- Commitments are up 6.5% vs last week and ahead of last year by 30.71%.

Source: USDA FAS Export Sales Report
Data as of Aug. 6, 2006.

NET SALES BY DESTINATION (CURRENT WEEK)	
India	-0.3K
Pakistan	-0.2K
Bangladesh	-0.0K
All Other	-0.0K
TOTAL	-0.4K

EXPORTS BY DESTINATION (CURRENT WEEK)	
India	2.6K
Thailand	1.5K
All Other	0.9K
TOTAL	5.0K

DEMAND SNAPSHOT (WoW)	
Total Commitments	160.4K
Commitments Last Week	93.1K
WoW Change	+67.3K
YoY Change	+30.2K

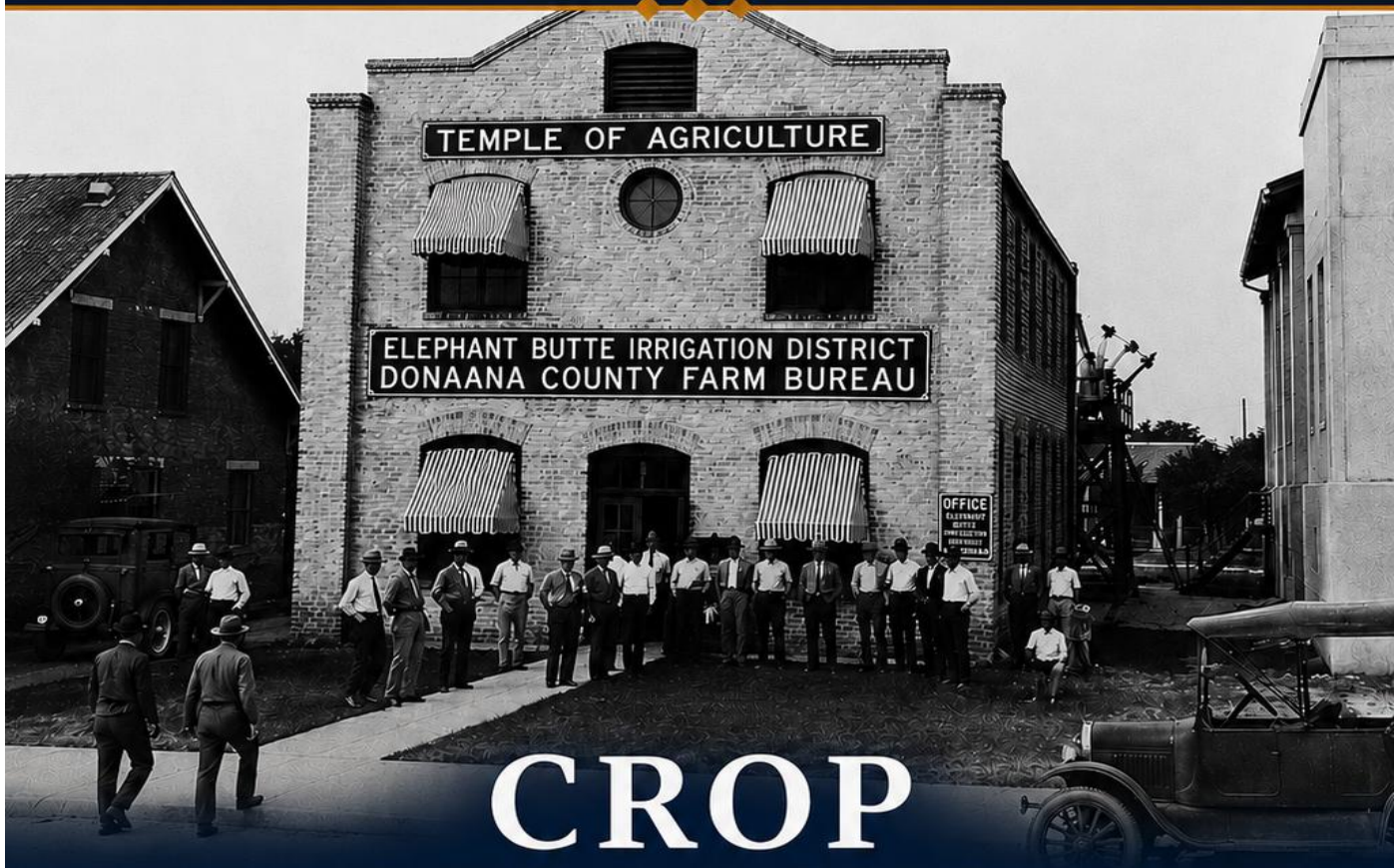
USDA

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 14, 2026
VOL. 8 ◆ ISSUE 32

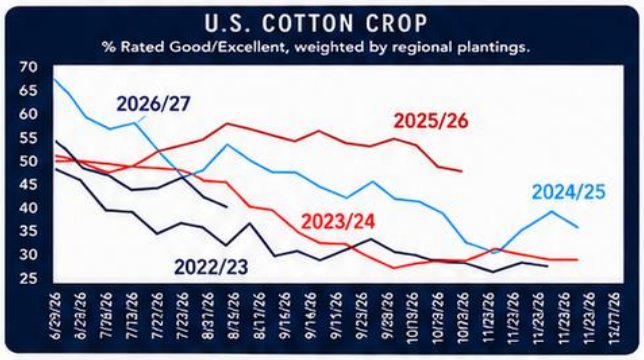


EXECUTIVE FIELD SUMMARY

The U.S. cotton crop continues to advance, with squaring nearly complete and boll setting reaching approximately 65%, slightly behind the 67% five-year average largely because of later planting across West Texas. Boll opening is running slightly ahead of normal in portions of Far-West Texas, where persistent heat is accelerating crop maturity.

Across the American Pima belt, conditions remain highly regional. **California** continues to lead, with crop condition and development remaining exceptionally strong. **Arizona** is advancing rapidly through peak bloom toward cutout, although hot, dry conditions are increasing irrigation demand and contributed to a week-over-week decline in crop ratings. **New Mexico** and Far-West Texas are progressing toward cutout and early boll opening, with heat accelerating development but placing greater importance on maintaining adequate late-season irrigation. **Texas** remains the primary concern, as statewide Good-to-Excellent ratings declined to 24%, reflecting persistent heat, uneven rainfall and moisture stress, particularly outside fully irrigated production.

Nationally, only 40% of the crop is now rated Good to Excellent, down from 42% the previous week, placing overall crop condition near the weaker 2022–2023 seasons. For the western Pima crop, the next several weeks will increasingly shift the focus from vegetative growth to boll retention, irrigation management, cutout timing and protecting yield and fiber-quality potential through final boll development.



COTTON CONDITION – SELECTED STATES: WEEK ENDING AUGUST 14, 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	-	6	18	48	28
Texas	10	24	42	21	3
15 States	6	16	38	33	7
Previous week	6	16	38	33	7
Previous year	7	11	29	43	10

CROP CONDITION CHANGE: AUGUST 9, 2026 vs. AUGUST 14, 2026

State	Aug 9, 2026 Good + Excellent	Aug 14, 2026 Good + Excellent	Change (percentage points)
California	95%	95%	—
Arizona	91%	76%	-15
Texas	28%	24%	-4

Source: USDA Crop Progress Reports

PIMA GROWERS INTERPRETATION

CALIFORNIA: LEADING THE WAY

California remains the strongest Pima production region, holding 95% Good to Excellent, unchanged from the prior week. Crop development remains strong and uniform as the crop moves through peak bloom toward cutout, with irrigation management and fruit retention remaining favorable.

ARIZONA: RATINGS FALL AS CROP APPROACHES CUTOUT

Arizona remains one of the most advanced production regions, but crop condition declined sharply this week, with Good-to-Excellent ratings falling from 91% to 76%. The decline reflects a shift from Excellent into Good and Fair/Poor categories as persistent heat and high water demand pressure the crop. With Arizona moving through peak bloom toward cutout, maintaining irrigation capacity and protecting boll retention are now the primary priorities.

TEXAS: WATCH LIST

Texas recorded the most significant deterioration among the major Pima states, with Good-to-Excellent ratings falling from 28% to 24% this week. Persistent heat, uneven rainfall and moisture stress continue to create substantial variability. Far-West Texas is progressing toward cutout and early boll opening, while conditions across the broader Texas crop remain increasingly dependent on irrigation availability.

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, potassiumi 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 declined fifteen percentage points overall, with significant movement from Excellent into Good. Texas recorded the largest deterioration, falling four percentage points as Very Poor and Poor acreage increased from 24% to 34%.

DATA + SOURCES
USDA, National Agricultural Statistics Service (NASS)
Crop Progress Reports
Released August 10, 2026
These 15 States planted 99% of the 2025 cotton acreage.

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8-12-26



PIMA COTTON: USDA AUGUST 2026 UPDATE

Modest Reduction in Production Outlook; Strong Yield Potential Across the Belt

The USDA August 2026 estimates, summarized by Trucott, project a modest reduction in American Pima production for the 2026/27 marketing year. U.S. Pima cotton production is forecast at 399,000 bales, down slightly from last month's estimate but up 9 percent from 2025/26. The outlook reflects a small decrease in planted acreage, offset in part by higher expected yields in key growing regions.

Total planted Pima acreage is estimated at 148,000 acres, down 2,000 acres from July but up 6,000 acres from last year. Harvested acreage is projected at 144,000 acres, compared to 142,000 acres in 2025/26. The average yield is forecast at 1,333 pounds per harvested acre, an increase of 116 pounds over last season and well above the U.S. all-cotton average of 798 pounds.

California remains the backbone of American Pima production, with 95,000 planted acres and an estimated 310,000 bales—representing 78 percent of total U.S. Pima output. Texas follows with 28,000 planted acres and 45,000 bales, a 13 percent increase from last year. Arizona is projected at 15,000 planted acres and 28,000 bales, while New Mexico is estimated at 10,000 planted acres and 16,000 bales.

U.S. all-cotton production is forecast at 13.61 million bales, down slightly from July, with ending stocks projected at 4.00 million bales. Globally, ending stocks for 2026/27 are reduced to 69.7 million bales, reflecting higher consumption and trade.

KEY TAKEAWAYS

- U.S. Pima production forecast at **399,000 bales**, down slightly from July but up 9% vs. 2025/26.
- Average yield projected at **1,333 lbs./acre**, up 116 lbs. from last year and well above the U.S. all-cotton average of 798 lbs.
- California leads with **310,000 bales** (78% of total), followed by Texas (45,000), Arizona (28,000), and New Mexico (16,000).
- Strong yield potential and favorable conditions support a high-quality crop across the Pima belt.

USDA, AUGUST 2025 - 2025/26 PIMA COTTON PRODUCTION ESTIMATE

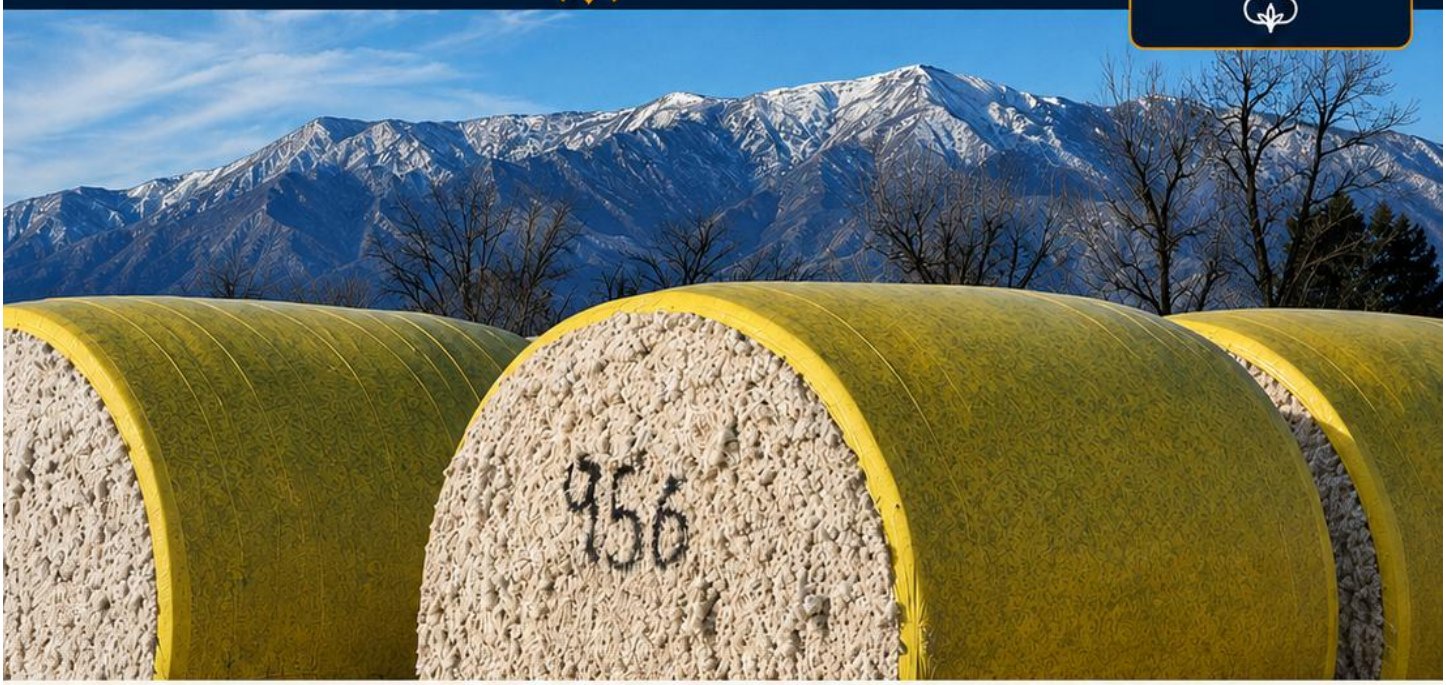
REGION	PLANTED ACRES ESTIMATE				HARV	YIELD	PROD
	2025/26 USDA MAY FINAL	2025/26 USDA MAR EST	2025/26 USDA JUN EST	2025/26 USDA AUG EST	Crop Estimate August 2025 Estimate Hvr Acres	Lbs.	Prod
PIMA	**142**	**130**	**150**	**148**	**144**	**1,333**	**399**
Arizona	16	15	15	15	15	896	28
California	92	80	95	95	94	1,583	310
New Mexico	13	15	15	10	10	792	16
Texas	21	20	25	28	25	864	45

Source: Trucott USDA Summary, August 12, 2026

American Pima does not compete primarily on volume. It competes on quality, consistency, traceability and value. The August USDA report gives the industry the opportunity for a larger crop; our responsibility now is to convert that production potential into the quality the market expects.

The opportunity is not simply to produce more Pima. It is to produce more Pima that deserves the premium.

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AMERICA'S FINEST COTTON
8-12-26
VOL. 8 ◆ ISSUE 47



U.S. PIMA COTTON BALANCE SHEET SUMMARY

IN 1,000 480-LB BALES

2025/26 CROP YEAR			2026/27 CROP YEAR		
PIMA	**AUG 26**	**EST.**	**PIMA**	**AUG 26**	**EST.**
Beginning Stocks	167	167	107	107	107
Production	405	405	399	399	399
Imports	5	5	0	0	0
Total Supply	**572**	**572**	**506**	**506**	**506**
Consumption	5	5	5	5	5
Exports	460	460	400	400	400
Total Demand	**465**	**465**	**405**	**405**	**405**
Unaccounted	0	0	0	0	0
Ending Stocks	**107**	**107**	**101**	**101**	**101**

KEY TAKEAWAY

The 2026/27 balance sheet reflects a slight tightening in supply with lower production and minimal imports, keeping ending stocks near record lows. Strong global export demand continues to be the foundation of the U.S. Pima cotton market.

PIMA COTTON AT A GLANCE

TIGHT STOCKS REMAIN

Ending stocks are projected at 101,000 bales for 2026/27—down slightly from 107,000 bales in 2025/26 and near historic lows.

PRODUCTION OUTLOOK

Production is estimated at 399,000 bales for 2026/27, a 6,000-bale decrease from the previous year.

EXPORT FOCUSED MARKET

Exports are projected at 400,000 bales, accounting for 99% of total demand. U.S. domestic consumption remains minimal at 5,000 bales.

BOTTOM LINE

Pima cotton continues to be a globally demanded, export-driven fiber with extremely limited ending stocks, underscoring its premium value and market resilience.

Source: USDA – World Agricultural Supply and Demand Estimates (WASDE) – August 12, 2026

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AMERICAN PIMA LOAN VALUE GUIDE

2026 CROP ELS (AMERICAN PIMA COTTON)

Source: USDA Farm Service Agency (FSA)

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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.

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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 14, 2026

VOL. 8 ◆ ISSUE 49

EXECUTIVE SUMMARY

Heat stress remains widespread across the American Pima production region. Safford, Arizona continues to lead cumulative thermal stress with 78+ stress points since planting, followed by Fresno, California (63), El Paso, Texas (55) and Lubbock, Texas (39) as of August 14. Deming, New Mexico remains lower but continues to accumulate 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	67	11	8	78+	HIGH
FRESNO, CA	57	6	6	63	HIGH
EL PASO, TX	48	7	6	55	HIGH
LUBBOCK, TX	35	4	2	39	MODERATE
DEMING, NM	25	1	0	26	LOW-MODERATE

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

Planting Dates Used: Safford—4/15 Fresno—4/10 El Paso—4/20 Lubbock—4/25 Deming—4/20

*Data through August 14, 2026. Sources: See Section VI.

II. COTTON CRITERIA & THRESHOLDS

Pima Growers Thermal Stress Screening Criteria

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 primary processes most affected.

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
weather.nmsu.edu

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

LUBBOCK, TX
West Texas 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)

EST. 2018 PIMA GROWERS AMERICA'S FINEST COTTON® — PROUDLY GROWN IN THE USA — FOLLOW US AT PIMACOTTON.ORG — Linkedin

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

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 14, 2026
VOL. 8 ◆ ISSUE 49

1. REGIONAL CROP DEVELOPMENT & DD60 SUMMARY

LOCATION	AVG. PLANTING DATE	DAYS AFTER PLANTING AUG. 14, 2026	DD60** (Base 60°F)	WEEKLY DD60 GAIN (AUG. 8 – AUG. 14)	CURRENT GROWTH STAGE (DD60 RANGE)
Deming, NM	Apr 20	117	1,714	+94	Peak Bloom to Early Cutout (924 – 1,280)
Fresno, CA	Apr 10	127	1,845	+107	Boll Fill / Early Open Boll (1,383 – 2,270)
El Paso, TX	May 1	105	1,583	+131	Peak Bloom to Early Cutout (752 – 924)
Safford, AZ	May 5	101	1,536	+134	Peak Bloom to Early Cutout (752 – 924)
Lubbock, TX	May 15	92	1,252	+91	Peak Bloom to Early Cutout (752 – 924)

*Weekly DD60 Gain = DD60s this week minus DD60s last week.
**DD60s are heat units using a base temperature of 60°F.

Planting Dates Used: Safford—5/5 Fresno—4/10 El Paso—5/1 Lubbock—5/15 Deming—4/20

*Data through August 14, 2026. Sources: See Section 10 for station sources.

2. SEASONAL COTTON WATER USE CURVE (TYPICAL)

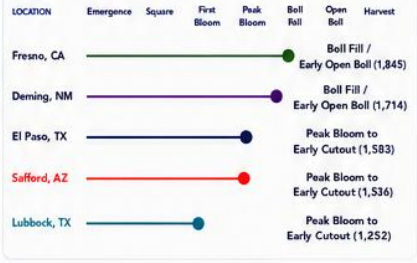
This curve represents typical cotton water use across the season. Actual timing varies by region.



	Emergence	Square	First Bloom	Peak Bloom	Boll Fill	Open Boll	Harvest
ETo (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 ETo)

Deming, NM	0.40
Fresno, CA	0.38
El Paso, TX	0.37
Safford, AZ	0.36
Lubbock, TX	0.31

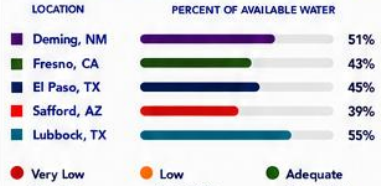
ETo = Crop Water Use (in/day)
ETo = Reference Evapotranspiration (in/day)

3. WEATHER & WATER DEMAND SUMMARY

LOCATION	5-DAY RAIN (in)* AUG. 10–14	7-DAY RAIN (in)* AUG. 8–14	EFFECTIVE RAIN (in)**	WEEKLY IRRIGATION NEED (in)
Deming, NM	0.00	0.02	0.00	2.78
Fresno, CA	0.00	0.00	0.00	2.72
El Paso, TX	0.24	0.40	0.24	2.20
Safford, AZ	0.00	0.00	0.00	2.47
Lubbock, TX	0.69	0.89	0.62	1.52

*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	7.6
Fresno, CA	16.6	6.9
El Paso, TX	15.7	6.2
Safford, AZ	15.6	5.8
Lubbock, TX	12.8	6.0

Remaining requirement = Forecast remaining crop ET from current stage to irrigation termination minus effective rainfall minus available root zone contribution.

7. COTTON DEVELOPMENT REFERENCE (DD60 GUIDE)

GROWTH STAGE	AVG. DD60s	TYPICAL DAYS AFTER PLANTING	WATER DEMAND
Emergence	110	8	Low (Green)
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)	2.4
ET Loss This Week	-2.6
ET Deficit Gained This Week	+0.0
Irrigation Applied This Week	+2.9
Net Water Deficit (inches)	8.7

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

DD60 FORMULA (BAYER CROP SCIENCE REFERENCE)

Daily DD60 Calculation: $DD60 = \left(\frac{Tmax + Tmin}{2}\right) - 60°F$

Where: Tmax = Daily Maximum Temperature (°F)
Tmin = Daily Minimum Temperature (°F)
Base Temperature = 60°F

10. DATA SOURCES BY REGION (MASTER STATIONS)

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	West Texas 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, Thursday, August 14, 2026.

EST. — PIMA GROWERS — 2018

AMERICA'S FINEST COTTON®

WEATHER RISK & INTELLIGENCE DASHBOARD

REGIONAL AG & CROP DEVELOPMENT OUTLOOK

WEEK ENDING
AUGUST 14, 2026
VOL. 8 ◆ ISSUE 49

EXECUTIVE SUMMARY

Heat stress remains elevated across the American Pima belt with daily highs above 100°F common. Arizona and Texas continue to face growing drought deficits, while New Mexico has received beneficial monsoon rainfall—Deming is now 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 14, 2026)

Location	2026 YTD Precipitation (inches)	Historical Average (inches) 1991–2020	Departure from Normal (inches)	Hydrological Crop Impact
Fresno, CA	7.32	8.02	-0.70	Slight Deficit: Minor irrigation demand increase continuing.
Safford, AZ	3.89	4.41	-0.52	Slight Deficit: Heat stress high; monsoon relief still needed.
Deming, NM	6.12	5.65	+0.47	Slight Surplus: Recent monsoonal rains improving outlook.
El Paso, TX	4.09	4.84	-0.75	Moderate Deficit: Continued dryness in Far West Texas.
Lubbock, TX	6.54	8.74	-2.20	Moderate to Severe Deficit: Drought concerns persist.

Notes: Departures are calculated from 1991–2020 PRISM Climate Normals.
Positive values indicate wetter than normal.
Sources: University Mesonet & Agricultural Weather Networks listed below.

II. 1-WEEK REGIONAL WEATHER & DEVELOPMENT MATRIX

(AUGUST 8 – AUGUST 14, 2026)

City & Region	High Temps (°F) (Observed)	Low Temps (°F) (Observed)	Rain & Monsoon (Observed)	DD60s Accumulated (Aug 8 – Aug 14)	Crop Development (Stage)
Fresno, CA (San Joaquin Valley)	102 – 105	68 – 72	0.00" (Dry)	30 – 32 DD60s / day (Accelerated reproductive pace)	Peak Bloom to Early Cutout
Safford, AZ (Gila Valley)	100 – 105	67 – 72	0.00" (Dry)	21 – 26 DD60s / day (Steady fruit setting)	Peak Bloom to Early Cutout
Deming, NM (Southwest NM)	92 – 99	64 – 69	0.17" (Scattered Monsoon)	18 – 22 DD60s / day (Slowed by moisture & cloud cover)	Peak Bloom to Early Cutout
El Paso, TX (Far West Texas)	95 – 103	71 – 76	0.24" (Light Showers)	22 – 25 DD60s / day (Balanced accumulation)	Peak Bloom to Early Cutout
Lubbock, TX (Texas High Plains)	97 – 104	70 – 74	0.46" (Scattered Showers)	26 – 30 DD60s / day (Sharp thermal accumulation)	Peak Bloom to Early Cutout

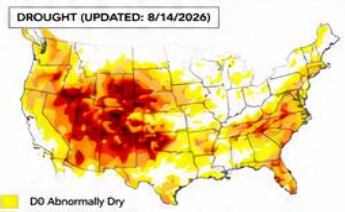
DD60 Base: 60°F (16°C) | ETc = Crop Water Use (in/day) *DD60s = Heat units using a base temperature of 60°F.
Values are station averages; ranges reflect local variability.

III. WEATHER & WATER DEMAND SUMMARY

Location	5-Day Rain (inches)* (Aug 10–14)	7-Day Rain (inches)* (Aug 8–14)	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	0.23	0.47	0.24	2.10
Safford, AZ	0.00	0.00	0.00	2.40
Lubbock, TX	0.40	0.80	0.64	1.60

*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.

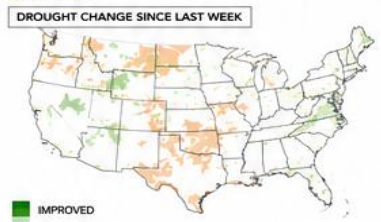
IV. U.S. DROUGHT MONITOR (UPDATED AUGUST 14, 2026)



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

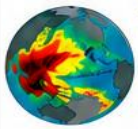
Source: U.S. Drought Monitor

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



IMPROVED
NO CHANGE
WORSENED

V. ENSO STATUS & HARVEST OUTLOOK



JULY 2026: RAPID SEA SURFACE WARMING! (LATEST NINO 3.4: +1.3°C / STRONG EL NIÑO)

Current Diagnostic Sea Surface Temperatures show above-average waters across the east-central equatorial Pacific. Model consensus favors El Niño continuing through winter 2026–27.

Impending Late-Season Impact: Elevated could bring below-normal parts of Delta Southwest later this fall.

Impending Late-Season Impact: Early transition of the southern stream couldrically below-normal rainfall for Jan-Mar Evaluates Intensity DAG (t+1.5°Cs

VI. PIMA GROWERS INTERPRETATION

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.

VII. 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
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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	TYPICAL DAYS AFTER PLANTING	WATER DEMAND
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Peak Bloom	1,280	97	Very High
First Open Boll	1,383	102	Very High
Mature Boll	2,270	145+	Low

IX. IRRIGATION OUTLOOK & RECOMMENDATION

Sustained heat and persistent dryness across Arizona and West Texas will keep irrigation demand very high through peak bloom and early boll fill. New Mexico's recent monsoon rains have provided localized relief.

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	+0.0
Irrigation Applied This Week	+2.9
Net Water Deficit (inches)	8.7

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

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Lubbock, TX	West Texas Mesonet

DD60 FORMULA (BAYER CROP SCIENCE REFERENCE)

Daily DD60 Calculation: $DD60 = \left(\frac{Tmax + Tmin}{2}\right) - 60°F$

Where: = Daily Maximum Temperature (°F)
Tmin = Daily Minimum Temperature (°F)
Base = Temperature = 60°F

KEY
DD60 = Heat units above 60°F base
ETc = Crop Water Use
ET = Reference Evapotranspiration

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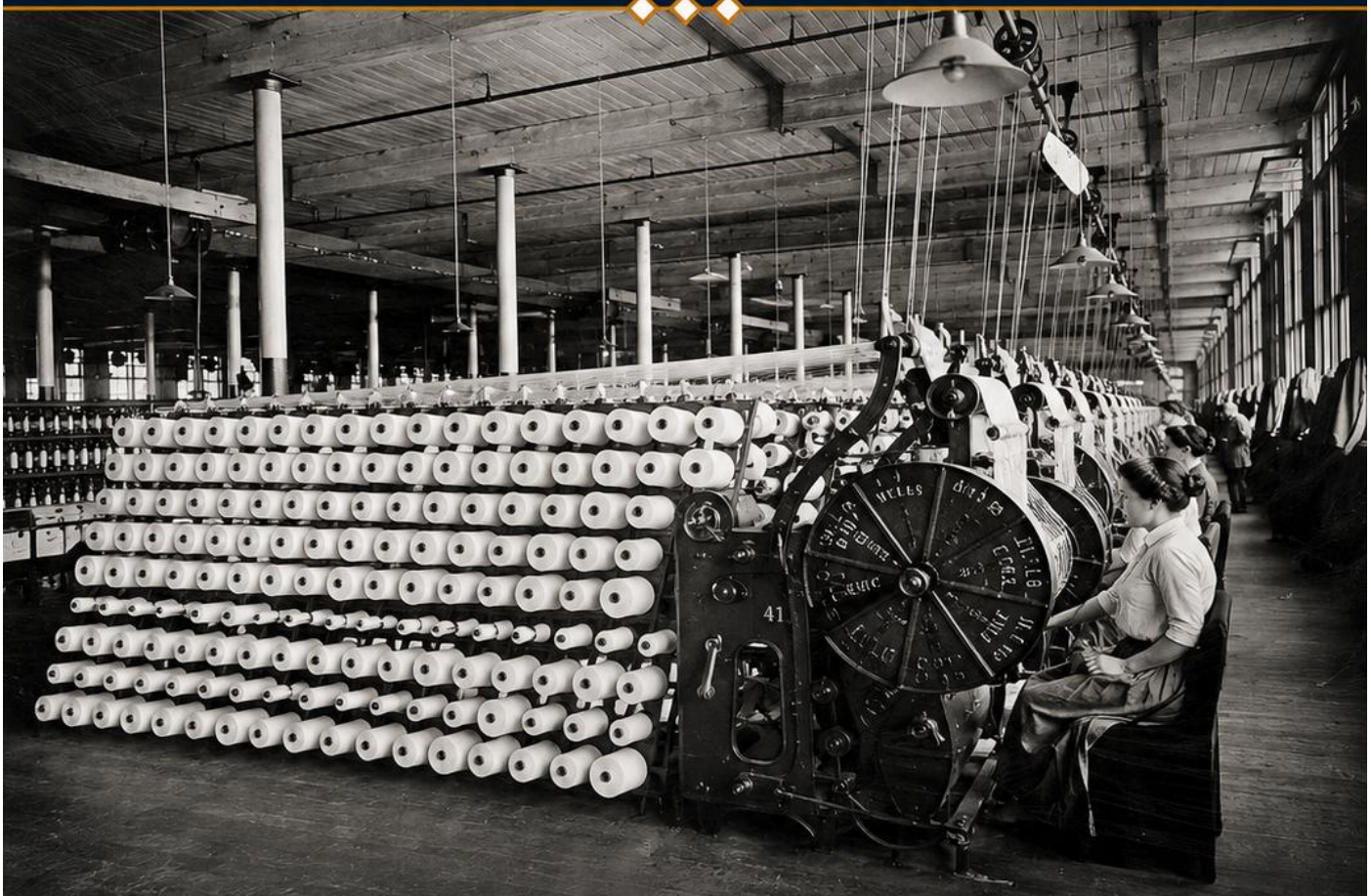
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Market data as of market close, Thursday, August 14, 2026.

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

From Our Fields to the World.

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WEST TEXAS UPDATE

8-14-26

WEST TEXAS











Pima production in West Texas is mostly from Lubbock to Gaines county. Average planting date is typically in a range of last week in April out to third week of May.

Crop update: total nodes 21–25, nodes above bloom from 3–5.

The majority of the crop is at or will be at cut out within 6 days. We are early going into cutout—about a week early in some fields due to hot temperatures and limited water to keep up with demand.

Image 1 is a 2x1 skip row pattern and image 3 is 2x2, image 4 is dragon line drip irrigation.
Skip row in dry years and with limited irrigation has been an extremely effective management tool...

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.

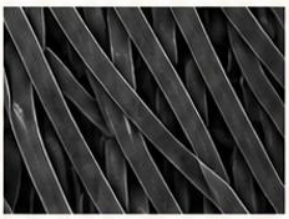
"The functional and aesthetic case for SUPIMA has always been strong," says Marc Lewkowitz. "What's changing is the ecosystem around it."

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

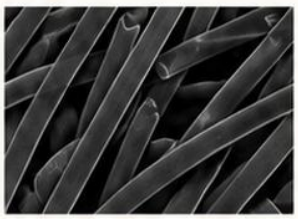
CHARACTERISTIC	AMERICAN PIMA (ELS)	CONVENTIONAL COTTON
Staple Length	Extra-long	Shorter
Yarn Quality	Finer, more uniform	Less uniform
Pilling Resistance	Less pilling	More pilling
Strength	Superior strength	Lower strength
Dye Retention	Vibrant colors	Fades sooner
Garment Life	Longer lasting	Shorter life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

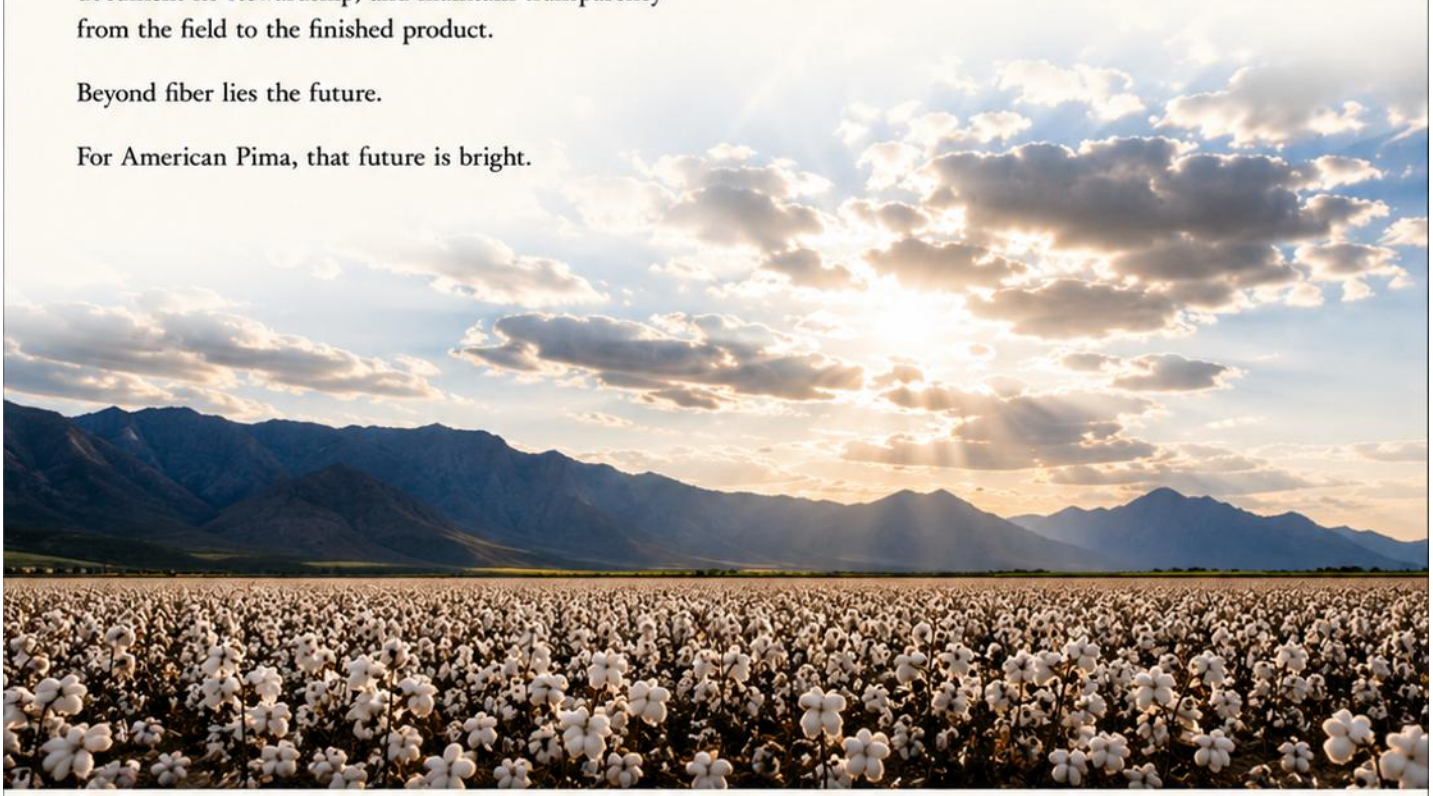
For American Pima growers, the opportunity is clear. Our fiber's exceptional, our production practices are among the most sustainable in the world. Our reputation is earned and enduring.

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.

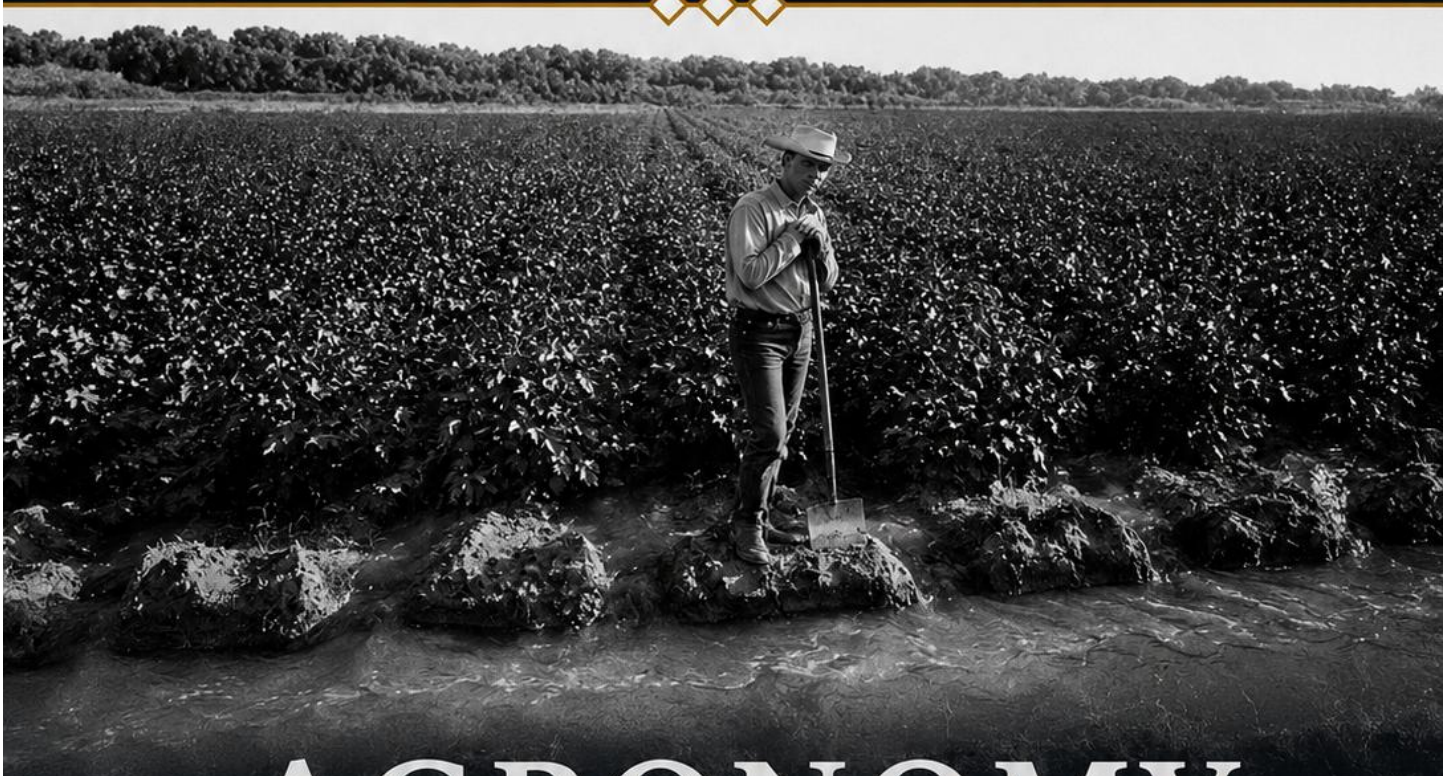
Built on stewardship, science and continuous improvement for people and the planet.

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AGRONOMY

SCIENCE • STEWARDSHIP • STRONGER YIELDS

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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PIMA FACTS

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AMERICA'S FINEST COTTON

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 14, 2026
VOL. 8 ◆ ISSUE 52



COTTON CROP & PEST SITUATION

Update by Kerry Siders, Ph.D. – Texas A&M AgriLife Extension
August 14, 2026

Cotton has not caught much of a break from this hot dry weather the last several weeks. Irrigation applications are critical currently while the cotton plant is still at peak water use for a while longer.

This brings up an important point. We are nearing the end of the blooming cycle and creation of bolls. Over the next 7–10 days we will be at the end of when a bloom. Always remember that we are dealing with a perennial plant in cotton. Any late growth will not have time to contribute to yield and in fact can detract from what is already there. Also, a growth regulator cannot fix that situation either.

Along these lines, and to support what my point is here, we are just now beginning to see the adjustment in fruit load in some fields. This adjustment causes squares and young bolls, less than 5–7-day old, to be shed from the plant. This is a natural process which occurs (of course make sure it is not insect induced) when the holding capacity of the plant has been reached.

That capacity is set by the plant which has been developed, soil nutrients, soil moisture, production of carbohydrates within the plant etc. Based on those parameters the plant can produce only so much, until something changes.

When these changes, like a big influx of soil moisture (or late fertilization), occur late it can cause the plant to resume vegetative growth. This directs energy into creating additional nodes, stems, leaves (vegetative growth), and subsequent squares (reproductive growth). This late growth will run out of heat units before it can develop into good contributing mature bolls.

So, be careful with any inputs you provide and how the plant will reacted to those inputs.

I have not seen cotton aphids for about three or four weeks now. However, I am concerned that they may still have time to be of concern. We have an ideal situation for aphids – skippy stands, maybe late N applications, etc. and the beneficial insects have wained in numbers the last few weeks without a consistent food source.

YOU MUST SCOUT TO BE ABLE TO BE AWARE OF THESE PROBLEMS!

The heat has also suppressed worm activity in general, not just in cotton but other crops as well.

***I will say that the Cotton Jassid was found in Grimes Co. (Anderson) Texas just last week by a professional crop consultant and confirmed by Dr. David Kerns. Dr. Kerns calculated that this was 57 days earlier than the cotton Jassid was found last year in Texas cotton.**

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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PIMA GROWERS JOURNAL

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CUTOUT PHYSIOLOGY

Late-Season Water, Heat-Unit (DD60), and Agronomic Management Criteria for Upland and Extra-Long Staple (ELS) Pima Systems in AZ, NM, and TX

SOUTHWEST REGIONAL COTTON TECHNICAL BULLETIN

Sourced from UAEX, NMSU, Texas A&M AgriLife, Bayer Crop Science, and NCC | See Page 4

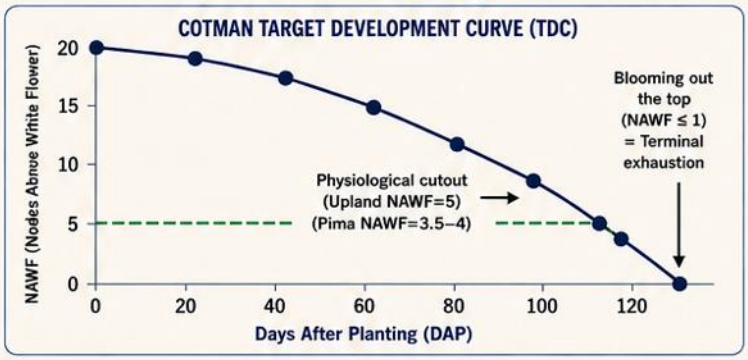


1 DEFINING CUTOUT & SOUTHWEST CROP PHYSIOLOGY

In Southwest cotton systems, cutout is the transition from vegetative growth to absolute reproductive dominance.

True cutout is defined as the point when vegetative extension ceases and the terminal fruit-bearing node decreases to **5 Nodes Above White Flower (NAWF=5)** for Upland cotton, and **NAWF=3.5 to 4 for Extra-Long Staple (ELS) American Pima cotton.**

Cutout typically occurs around 1,200 to 1,300 accumulated DD60s from planting. Hottest Arizona environments compress the timeline, while cooler New Mexico and Texas High Plains conditions extend the vegetative window.



2 EXTRA-LONG STAPLE (ELS) PIMA DIFFERENTIATION

- Pima has a more aggressive, indeterminate growth habit and sensitive photoperiod response, requiring specialized vegetative suppression.
- Pima fibers achieve unmatched upper half mean length (>1.38 in.) and superior strength (>40 g/tex). The metabolic cost per boll is higher.
- Pima reaches cutout at **NAWF = 3.5 to 4.**
- Pima requires 15%–20% more thermal energy (DD60s) than Upland.
- A Pima boll needs ~1,050 to 1,150 DD60s from anthesis to open vs. ~850 DD60s for Upland.

★ **KEY DIFFERENCE:** In between Upland and Pima, the Hybrid Pima falls more in line with typical full season Upland varieties then Pima maturity.

3 WATER DEMAND & LATE-SEASON IRRIGATION REQUIREMENTS

Maintaining adequate soil moisture from cutout to termination is critical—60% to 70% of total boll weight and final fiber properties are accumulated post-cutout.

REGIONAL CONSUMPTIVE WATER USE PROFILES (POST-CUTOUT)

REGION	PEAK ET (in./day)	TOTAL WATER (Acre-inches)	FINAL IRRIGATION TIMING (Post-Cutout DD60s)
Arizona Low Deserts (UAEX)	0.28 – 0.35	6 – 9	600 – 800 (~early–mid Sept.)
New Mexico & West Texas High Plains (NMSU / Texas A&M; AgriLife)	0.15 – 0.22	4 – 6	350 – 450

Ensures top-crop bolls fully mature without heat-stress desiccation.

4 HEAT-UNIT (DD60) GUIDED TERMINATION PROTOCOLS

Daily DD60 = [(Max Temp + Min Temp) / 2] – 60°F
(Max capped at 100°F; Min limited to 60°F.)
Termination targets are tracked relative to the day the field reached physiological cutout.

MANAGEMENT VECTOR	UPLAND COTTON THRESHOLD (DD60s Post-Cutout)	HYBRID PIMA THRESHOLD (DD60s Post-Cutout)	ELS PIMA COTTON THRESHOLD (DD60s Post-Cutout)	PHYSIOLOGICAL / QUALITY RATIONALE
Insecticide Termination (Lygus / Plant Bugs)	250 – 300	275 – 325	350 – 400	Boll outer carpel wall hardens; effectively resists piercing/sucking mouthparts.
Insecticide Termination (Bollworms / Stink Bugs)	350 – 450	400 – 500	450 – 550	Protects late top-crop bolls until seed-coat formatting is completed.
Irrigation Termination (Texas High Plains / NM)	350 – 450	400 – 500	500 – 600	Forces final boll opening; avoids structural freeze damage to upper canopy.
Irrigation Termination (Arizona Low Deserts)	600 – 800	650 – 850	800 – 950	Maintains microclimate evapotranspiration; prevents thermal seed abortion.
Harvest-Aid / Defoliation (Chemical Initiation)	850	950 – 1,050	1,050 – 1,150	Ensures full carbohydrate loading; preserves fiber length and micronaire.

5 MANAGEMENT IMPACTS ON YIELD & FIBER QUALITY PARAMETERS

UPPER HALF MEAN LENGTH (UHML) & UNIFORMITY

Fiber elongation occurs exclusively during the first 21 days following anthesis. Severe moisture stress or premature defoliation before ~800 DD60s truncates elongation, reducing UHML by up to 2/32nds of an inch and driving up short

MICRONAIRE STABILIZATION

Secondary cell wall cellulose deposition dictates fiber maturity and micronaire, occurring from ~21 to 50 post-anthesis.

Too early = low-micronaire (<3.5). Too late (excessive N/water) = high-micronaire (>5.0).

HARVEST AID MECHANICS (THE SHARP KNIFE METHOD)

Defoliation must be scheduled based on the calendar. Cross-section the largest top boll: if seed-coat is dark brown and cotyledons are fully formed with no wet jelly pockets, the crop is ready.

BOTTOM LINE

- ✓ Hit cutout on target.
- ✓ Manage water by DD60.
- ✓ Protect bolls.
- ✓ Preserve fiber.
- ✓ Maximize premium.

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Bollworm in Cotton

Control Strategies and Economic Thresholds During Peak Bloom







Bollworm (*Helicoverpa zea*) remains one of the most economically important insect pests affecting American Pima cotton. Because commercial Pima varieties do not contain Bt insect protection, successful bollworm management depends on timely field scouting, accurate identification of eggs and small larvae, and insecticide applications based on established economic thresholds. An integrated pest management (IPM) program that emphasizes early detection, threshold-based treatment decisions, and preservation of beneficial insects provides the most effective and economical approach to protecting yield and premium fiber quality.

UNDERSTANDING BOLLWORM DAMAGE

Young larvae initially feed on blooms and small squares before moving into developing bolls.

Typical symptoms include:

- Damaged or shed squares
- Feeding holes in blooms
- Entry holes in green bolls
- Internal lint and seed feeding
- Increased boll rot from secondary pathogens

Once larvae enter the boll they become significantly more difficult to control, making early detection essential.

TEXAS A&M TREATMENT THRESHOLDS FOR NON-Bt COTTON (AMERICAN PIMA)

SITUATION	RECOMMENDED TREATMENT THRESHOLD
Non-Bt cotton (American Pima)	6% damaged fruiting forms with live larvae present or approximately 3% large larvae present

Source: Texas A&M AgriLife Extension, Managing Cotton Insects in Texas

Because American Pima cotton lacks Bt insect protection, consistent scouting from first bloom through cutout is essential. Small larvae are significantly easier to control before entering squares and bolls, making early detection the foundation of successful management.

BEST MANAGEMENT PRACTICES

- ✓ Treat small larvae before they enter fruiting structures.
- ✓ Preserve beneficial insects whenever possible.
- ✓ Rotate insecticide modes of action.
- ✓ Avoid unnecessary pyrethroid applications where resistance is suspected.

EFFECTIVE CHEMISTRY

Texas A&M identifies **diamide** insecticides as the preferred option for bollworm management.

Examples:

- **Chlorantraniliprole (Prevathon®)**
- **Besiege® (diamide + pyrethroid)**

Other options include:

- Spinosad
- Indoxacarb
- Methomyl

SCOUTING RECOMMENDATIONS

- Scout fields at least twice weekly during bloom.
- Examine approximately 100 plants throughout the field.
- Record eggs, small larvae, damaged squares, blooms, and bolls.
- Pay close attention to field edges and areas adjacent to corn, where moth migration is often greatest.

WHAT THIS MEANS FOR AMERICAN PIMA

Pima cotton's longer fruiting period can extend exposure to bollworm pressure later into the season. Maintaining weekly scouting during peak bloom through cutout is therefore especially important. Economic thresholds—not calendar sprays—should drive treatment decisions. Timely intervention against small larvae protects yield, fiber quality, and profitability while minimizing unnecessary insecticide use and preserving beneficial insect populations. Texas A&M research continues to support threshold-based IPM as the most economical and sustainable approach for cotton producers.

SCOUT – DECIDE – ACT: AN IPM WORKFLOW

1. **SCOUT TWICE WEEKLY** — Inspect at least 100 plants.
2. **COUNT EGGS & LARVAE** — Record eggs, small larvae, and larval sizes.
3. **ASSESS FRUIT INJURY** — Check squares, blooms, and bolls for damage.
4. **COMPARE TO THRESHOLD** — Use Texas A&M economic thresholds to decide.
5. **TREAT IF THRESHOLD EXCEEDED** — Target small larvae for best control.

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STINK BUG MANAGEMENT IN SOUTHWEST COTTON

Protecting Squares, Blooms and Bolls for Maximum Yield and Fiber Quality



Stink bugs are among the most economically important pests in cotton across Arizona, New Mexico and West Texas. Feeding on squares, blooms and developing bolls causes fruit loss, yield reduction and lint damage. Effective management requires timely scouting, accurate thresholds and targeted treatments.

KNOW YOUR ENEMY

- **Green stink bug** (*Chinavia hilaris*) – most common species in the Southwest.
- **Brown stink bug** (*Euschistus servus*) – can be locally abundant.
- Both species feed with piercing-sucking mouthparts on squares, blooms and bolls, injecting toxic saliva that causes fruit to abort or lint to stain.

Source: Texas A&M AgriLife Extension – Stink Bugs in Cotton (ENTO-087)

LIFE STAGES IN COTTON

ADULT	EGG MASS	NYMPH	DAMAGE
			
Shield-shaped adults are 1/2–5/8 inch long and green to brown.	Eggs are barrel-shaped, laid in clusters of 12–28 on leaf undersides.	Nymphs go through 5 instars before becoming adults.	Feeding causes square drop, boll abortion and lint staining.

SCOUTING RECOMMENDATIONS

- Begin scouting at first square and continue through cutout.
- Sample at least 2–3 locations per field (more for large fields).
- Use a 15-inch sweep net; 25 sweeps = 1 sample.
- Check squares, blooms and small bolls for adults and nymphs.
- Pay close attention to field edges and weedy areas.

Source: Texas A&M AgriLife Extension – Scouting Cotton Pests (ENTO-001)

TREATMENT THRESHOLDS FOR STINK BUGS IN SOUTHWEST COTTON

CROP STAGE	TARGET PEST STAGE	THRESHOLD (PER 25 SWEEPS)			COTTON STAGE NOTES
		ARIZONA	NEW MEXICO	WEST TEXAS	
Squares (First Square to First Bloom)	Adults	3–4	3	3–4	Treat if adults exceed threshold and squares are being lost.
Bloom (First Bloom to Peak Bloom)	Adults	5	5	5	Protect blooms to prevent square and boll abortion.
Early Boll (Peak Bloom to 20 DAP)	Nymphs & Adults	10	10	10	Nymphs can be more damaging to small bolls.
Mid to Late Boll (21 DAP to Cutout)	Nymphs & Adults	15	15	15	Bolls are larger and more tolerant but still protectable.

Source: Texas A&M AgriLife Extension – Stink Bug Thresholds in Cotton (ENTO-087)

DAP = Days After Peak Bloom

MANAGEMENT STRATEGIES

SCOUT EARLY & OFTEN
Early detection is key to preventing fruit loss and unnecessary sprays.

TREAT AT THRESHOLD
Use thresholds above to guide treatment timing.

TARGET NYMPHS WHEN POSSIBLE
Nymphs are more vulnerable to insecticides than adults.

PRESERVE BENEFICIALS
Avoid broad-spectrum insecticides when possible to conserve natural enemies.

INTEGRATE WEED MANAGEMENT
Weed hosts can harbor stink bugs early in the season.

INSECTICIDE TREATMENT OPTIONS (EXAMPLES)

Always read and follow label directions. Rotate modes of action.

MODE OF ACTION	ACTIVE INGREDIENT	EXAMPLE PRODUCTS	NOTES
Group 3	Lambda-cyhalothrin	Warrior® II, Mustang® Maxx	Effective on adults and nymphs; short residual.
Group 4A	Acetamiprid	Intruder®	Systemic activity; good on nymphs.
Group 28	Chlorantraniliprole	Prevathon®	Suppresses nymphs and adults.
Group 9B	Pyriproxyfen	Centaur®	Insect growth regulator; best on nymphs.
Group 5	Spinosad	Blackhawk®	Effective on nymphs and adults.

Source: Texas A&M AgriLife Extension – Cotton Insect Control Guide

KEY TAKEAWAY

Consistent scouting, threshold-based decisions and targeted treatments protect yield and fiber quality while preserving beneficial insects and reducing unnecessary costs.

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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.

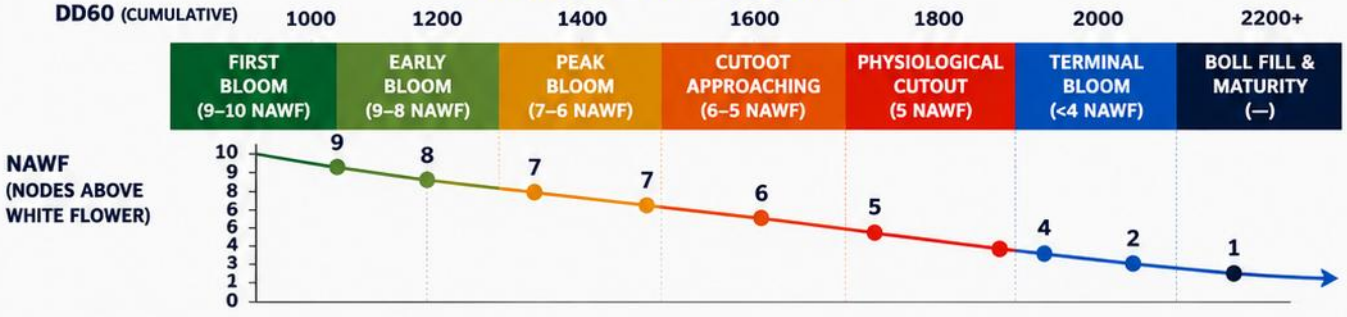
TWO CLOCKS, ONE CROP.

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.

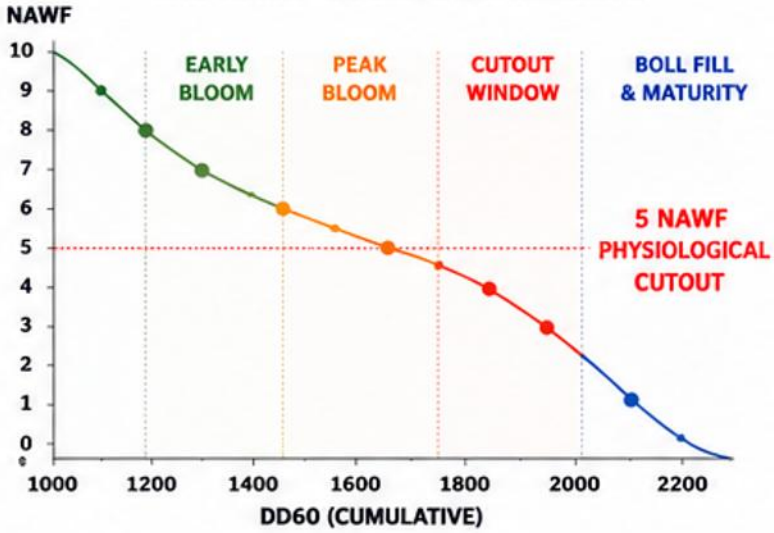
THE COTTON COUNTDOWN CLOCK
DD60 ↔ NAWF TIMELINE



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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Still Shrinking, Just Slower: U.S. Apparel Imports Through June

Robert Antoshak

Managing Partner, Gherzi Americas | Four Decades in Textiles & Apparel | Sourcing, Trade Policy & Market Strategy | Traceability & Trade Risk | Industry Writer & Commentator
August 8, 2026

Apparel imports are still falling, but June is the first month since the turn of the year in which they fell by less.

OTEXA posted the June figures on August 4. Six-month apparel imports came to $35.09 billion, off 8.04 percent from the same period last year, and volume dropped 8.50 percent measured in square meter equivalents. The average unit price moved only half a point, which means the money that left the trade left with the goods; price had almost nothing to do with it.

Apparel carries the whole textile and apparel number in any case. In the first half of 2025 apparel accounted for $38.16 billion of a $51.44 billion total, or about three-quarters of it. This year's apparel total is $3.07 billion lighter.

June was less bad

Through May the decline stood at 9.25 percent, or $28.78 billion, with volume off 9.48 percent. Six months in, those figures come back to 8.04 percent and 8.50 percent. Taking January through May out of the half leaves June at roughly $6.31 billion against approximately $6.46 billion a year earlier, a decline of 2.3 percent. That is better than every month before it, and it is still a decline.

Timing could account for part of the improvement, as could soft comparisons or orders written ahead of the July tariffs. Whatever put the brake on, demand was falling more slowly as the half closed. Whether that holds is the second-half question. Retailers have not gotten comfortable with inventory, consumers are picking their spots, and importers are working under a policy regime that can move landed cost on a few weeks of warning.



Fig. 1 — The rate of decline eased as the half closed.

Winners and losers are pulling further apart

The contraction did not land evenly. Cambodia led the majors with a 12.32 percent gain in value on 14.59 percent more volume. Indonesia added 3.40 percent in value while shipping 10.89 percent more, and Vietnam managed 1.08 percent and 3.30 percent. Measured against 2025 those numbers look thin, but in a market shrinking more than 8 percent they are share gains.

Bangladesh went backward and still beat the market, falling 5.75 percent to $4.01 billion while holding about 11.4 percent of U.S. imports. June alone came in up 5.74 percent at $763.57 million, which pulled the year-to-date decline in from 8.08 percent through May. Pakistan turned harder: down 12.35 percent through May, down 3.50 percent through June, with volume up 2.26 percent for the half. Price did that work.

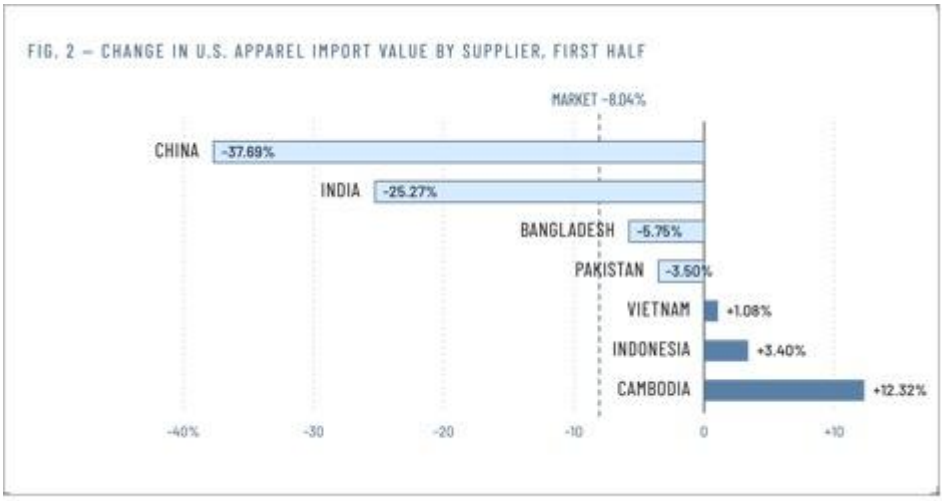


Fig. 2 — Change in U.S. apparel import value by supplier, first half.

China’s decline is still the defining change

China’s import value fell 37.69 percent, with volume down 26.30 percent and average unit price down 15.46 percent. Fewer garments went out the door and less money came back for each one that made it, and there is no worse way to lose business. Through May the drop was 42.75 percent, so June helped, but the decline remains more than double what any other significant supplier reported.

Nothing that size is cyclical. Buyers are cutting China exposure on purpose, tariff cost is in the math, and some of the work has landed in Vietnam and Cambodia with a share going to Indonesia. The rest of it went away when retailers cut their buys.

India is the warning against assuming China's losses simply get spread around. Indian shipments fell 25.27 percent in value on 22.74 percent less volume, with unit price down 3.28 percent, so India lost the orders and the revenue together. It did that with a large manufacturing base, its own fiber supply and a wide product range, which suggests something structural is in the way: cost, delivery, product fit or customer concentration, take your pick. The business leaving China is getting picked up by whoever the buyer already trusts.

What the gains cost

Dollar totals hide the trade each supplier made. Cambodia's 12.32 percent value gain came on 14.59 percent more volume with prices off 1.98 percent, so the growth was bought with orders, and Vietnam did something similar at a smaller scale, taking 3.30 percent more volume for 1.08 percent more money. Indonesia is the harder case: value up 3.40 percent, volume up 10.89 percent and average unit price down 6.75 percent. Those factories are busier and they paid for it.

Pakistan moved 2.26 percent more volume for 3.50 percent less money, with unit price off 5.63 percent. Bangladesh lost 3.69 percent of volume and 2.15 percent of price, which is where its 5.75 percent value decline comes from. Import growth is not margin. Several of the countries adding volume are doing it while their prices fall, and that shows up when the books close.

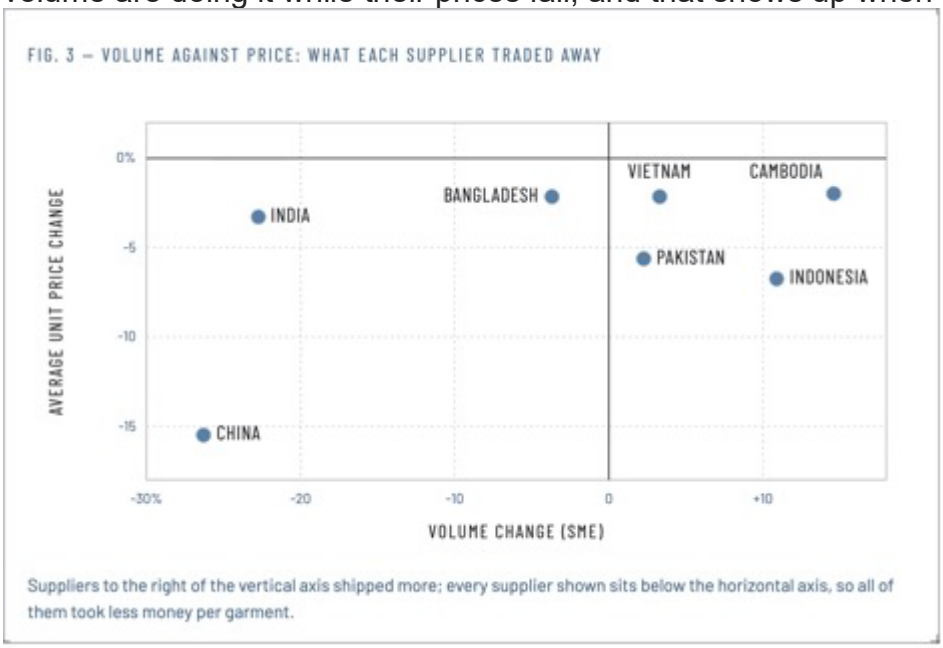


Fig. 3 — Volume against price: what each supplier traded away. Suppliers to the right of the vertical axis shipped more; every supplier shown sits below the horizontal axis, so all of them took less money per garment.

The sourcing map keeps concentrating

Southeast Asia is absorbing the shift. Vietnam anchors it, Cambodia is scaling off a small base, and Indonesia is picking up volume. Bangladesh still holds a large position in spite of the year-to-date number, China and India are the losers, and Pakistan has stopped falling, with the pricing telling you what that cost.

Labor rates do not explain who is winning. Buyers are paying for capacity, speed, materials access and execution that holds up under audit, and they want factories that can move when tariff treatment changes. The Western Hemisphere still has not taken a meaningful piece of what China gave up. Nearshoring reads well on paper, with shorter transit and less inventory tied up, but the import data says the shifts are happening inside Asia. Proximity by itself has never won an order; buyers need materials they can source close to the sewing and capacity they can book a year out.

Tariffs will reshuffle the second half

The picture changed after the June reporting period closed. July tariffs add 12.5 percent to imports from Vietnam and China. Bangladesh, Cambodia, Indonesia and Malaysia face 10 percent, and those

four were named in a planned textile mechanism that could reduce or remove some of the additional duty on qualifying apparel tied to purchases of U.S. cotton and textile inputs. Vietnam was left out. India carries the 10 percent and was left out of the quota mechanism as well, and Indian industry has warned that the treatment will push orders toward suppliers who qualify. Vietnam's manufacturing advantages survive this, but the differential still shows up in costing, particularly on basic high-volume programs where margin is thin to start with.

The mechanism could also link U.S. cotton and yarn producers to Asian apparel exporters. Whether it amounts to anything depends on the size of the quota, the products it covers, the paperwork it demands and whether factories can build with U.S. inputs without wrecking cost or delivery.

What to watch

Volume is the number to follow. Sustained volume growth means retailers are restocking and writing orders, while value rising on flat volume means tariffs and costs are moving through the chain. Average unit values will show what the share gains cost: Indonesia and Pakistan held or grew volume while their prices dropped hard, which keeps machines running and does nothing for the financials. The half closes with a market that is smaller and much more exposed to trade policy than it was a year ago. June was a break in the weather.

THE APPAREL MARKET GAZETTE

• August 2026 • Special Inflation Edition •

APPAREL PRICES RUN HOTTER THAN CPI

July data shows clothing costs still outpacing headline inflation, raising the stakes for retailers, brands, and consumers in the season ahead.

1 THE NUMBERS

- All-items CPI rose 3.4% year over year in July.
- Apparel prices rose 3.9% year over year.
- Headline CPI increased 0.1% month over month, seasonally adjusted.
- Apparel also rose 0.1% after declining in June.
- Commodities excluding food and energy rose just 0.8% year over year.



BOTTOM LINE

★

Headline CPI is not the full consumer story. While overall inflation rose 3.4% in July, apparel climbed 3.9%, showing that category-level inflation is still diverging in meaningful ways.

2 WHY IT MATTERS

For much of the post-pandemic reset, apparel was one of the easier categories for prices to cool. That era appears to be fading. July data shows apparel inflation still running above headline CPI.

The gap is modest, but it matters. It signals firmer pricing in one of the most price-sensitive categories in the consumer basket.

That makes the season ahead more challenging for everyone in the apparel value chain.

3 FOR CONSUMERS

Inflation fatigue is real, and it shows up quickly in clothing.

Back-to-school lists, kids' growth spurts, everyday basics, athletic shoes, and seasonal wardrobes—these are visible, non-discretionary spends for many households.

When prices stay elevated, trade-offs follow: fewer items, lower price points, private labels, and sharper deal hunting. Budgets feel it.

4 FOR RETAILERS

Higher prices can support revenue—if unit sales hold.

If overall inflation cools while apparel stays elevated, shoppers may turn more selective.

Expect greater sensitivity to price, deeper comparison shopping, and a higher bar for full-price buys.

Promotions may become more important to drive traffic and conversion, while inventory discipline will be critical to protect margin and avoid markdown overhang.

5 FOR BRANDS

This is a margin-management moment.

It is shaped by sourcing, tariffs, freight, wages, markdowns, and pricing strategy.

Winners will know where consumers will accept price, where value messaging is needed, and where assortment must work harder than discounting.

Clarity on these choices will separate leaders from the rest.

BOB'S TAKE

★

As the market moves into back-to-school, fall apparel, and holiday planning, pricing strategy, inventory control, and value perception will matter just as much as the headline CPI number.

MARKET WATCH | CPI • Inflation • Retail • Apparel • Consumer Spending • Fashion Retail • Pricing Strategy • Economy

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- 70+ MILLION BALES MARKETED
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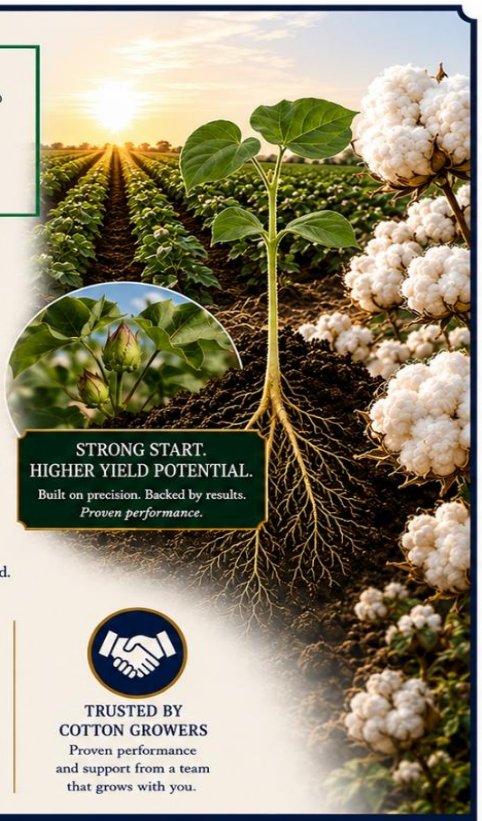
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- PREMIUM FIBER QUALITY & GENTLE HANDLING
- STATE-OF-THE-ART EQUIPMENT
- INTEGRITY, SERVICE & COMMUNITY FOCUSED

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STATE-OF-THE-ART OPERATIONS

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