THE PIMA FIELD & MARKET JOURNAL PIMA GROWERS

PIMA GROWERS

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

WEEK ENDING AUGUST 21, 2026



COVER STORY

FROM FIELD TO CONSUMER

Why a Shorter Supply Chain Creates Greater Value for American Pima

American Pima's value is increasingly defined not only by fiber quality, but by the ability to trace it from field through spinning, manufacturing and the consumer. This issue examines a shorter, verifiable supply-chain model—and why fewer handoffs, origin verification and regional visibility can strengthen trust, reduce risk and preserve premium value.

PIMA vs. UPLAND FIBER SPREAD

$0.8265
PER POUND

Pima spot price	$1.71/lb
Upland spot price	$0.8835/lb

Pima premium over Upland

93.5%

American Pima retains a strong premium, with the current spread $0.0065 above the prior five-year average of $0.8200 per pound.

Source: Trading Economics and PCIA market benchmarks, August 21, 2026.

FEATURED IN THIS ISSUE

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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 Pima Growers, PCIA connects growers, markets, industry partners and consumers while supporting research, education, market development and supply-chain collaboration.

EXECUTIVE 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, while 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 impartial field intelligence, market insight and industry leadership.

WHO WE ARE

PIMA COTTON IMPROVEMENT ASSOCIATION (PCIA)

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

PIMA GROWERS

The grower and industry communications platform of PCIA, providing market intelligence, production updates, educational resources and Field-to-Fiber storytelling.

WHY WE EXIST

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

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.

THE AMERICAN 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 Products
→ **CONSUMERS** — Quality, Sustainability & Trust
→ **RESEARCH & INNOVATION** — Investing in the Future of Pima Cotton

Building a stronger, more profitable future for American Pima cotton.

CONNECT WITH PIMA GROWERS

MEMBERSHIP

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- Small Business Partner
- Corporate Partner

ADVERTISING & PARTNERSHIPS

- Journal Sponsorships
- Feature Articles
- Industry Partner Pages

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THE 2026 CROP ENTERS THE FINISHING STAGE

Heat, Water Discipline and Market Position Define the Week

American Pima moves from cutout toward first open boll as growers protect boll fill, fiber quality and harvest timing.

WEEK ENDING AUGUST 21, 2026



PIMA PERSPECTIVE

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

The 2026 American Pima crop has entered its decisive finishing phase. California ranges from cutout to the first open boll, while Arizona, New Mexico and West Texas are moving through early cutout and boll fill. The management objective is no longer to build more plant—it is to finish the harvestable bolls already established and protect fiber quality.

Heat remains a defining risk. Cumulative thermal exposure is high across all five reporting regions, with Safford leading at 98 stress points. The regional irrigation index stands at 7.2—High—with an average modeled weekly requirement of 2.4 inches. Irrigation should taper with crop stage. measured root-zone moisture, NAWF, mature boll position and the percentage of open bolls—not by calendar date alone.

The market continues to offer a constructive backdrop. USDA projects 399,000 bales of American Pima production at 1,333 pounds per acre. Pima retains a $0.8265-per-pound premium over Upland. Through export-sales week two, total commitments reached 166.3K bales, 76.8% ahead of last year, while the broader market-environment index remained moderately positive at 65.

This week's journal connects those signals: finish the crop carefully, manage late-season pests and irrigation precisely, and convert the available production into the quality, traceability and consistency required by the premium market.

KEY TAKEAWAYS

CROP FINISH

California is at cutout to first open boll; the Southwest is in early cutout and boll fill.

WATER DISCIPLINE

Irrigation Index: 7.2—High. Taper by crop stage and measured root-zone moisture.

MARKET POSITION

Pima/Upland premium: $0.8265/lb. Export commitments: 166.3K bales.

QUALITY RISK

Heat, spider mites, boll maturity and harvest timing remain the principal late-season watchpoints.

THIS WEEK ACROSS THE JOURNAL

SIGNAL	CURRENT READING
U.S. Pima Production	399,000 bales
U.S. Pima Yield	1,333 lb/acre
Total Export Commitments	166.3K bales; +76.8% YoY
Pima Premium Over Upland	+$0.8265/lb
Irrigation Index	7.2— High
Highest Thermal Stress	Safford: 98 points
Largest YTD Rainfall Deficit	Lubbock: –3.42 in

Sources: USDA; USDA FAS/Sugima weekly export report; IEM ASOS/AWOS; NOAA/NCEI; journal dashboards and field reports. Data through August 21, 2026.

American Pima's premium is earned in the final weeks through disciplined water management, pest control, boll maturity and timely harvest.

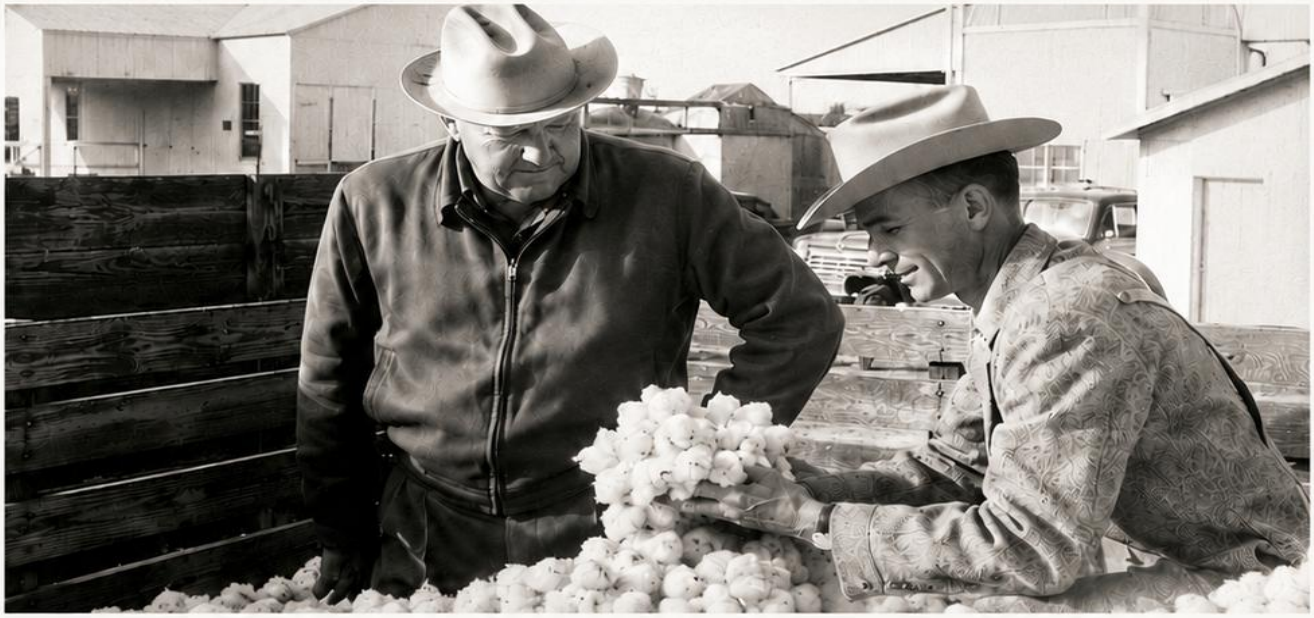
The job now is not to build more plant:
It is to finish the bolls already earned—and deliver the quality the premium market expects.

FROM FIELD TO CONSUMER

Why a Shorter Supply Chain Creates Greater Value for American Pima

Traceability, verification and a closer connection
between growers and consumers are becoming sources of value.

WEEK ENDING AUGUST 21, 2026



Recent recalls involving jalapeños and iceberg lettuce provide an important reminder about modern agricultural supply chains.

The significance is not simply that a problem occurred. What matters is the ability of the supply chain to work backward—from a finished product through processors, distributors and handlers to the agricultural source—and then determine where affected products moved.

That capability depends on something increasingly important across agriculture: Verification.

Food and cotton obviously carry very different risks. But the underlying supply-chain principle is the same. As agricultural products move through increasingly complex systems, the ability to verify origin and maintain chain of custody becomes more difficult—and potentially more valuable.

For American Pima cotton, that creates an opportunity that extends well beyond traditional fiber quality.

A U.S. COTTON BALE CAN TRAVEL THE WORLD

The United States exports a substantial portion of the cotton it produces. Once a bale leaves the country, however, its journey may only be beginning.

A U.S.-grown bale can be exported to one country for spinning, with the resulting yarn shipped to another country for weaving or knitting. Fabric may then move somewhere else for dyeing and finishing before traveling to yet another country for garment manufacturing.

The finished product can eventually return to the United States and be sold to an American consumer.

U.S. Field → Gin → Export → Foreign Spinner → Yarn → Fabric Mill → Dyeing & Finishing → Garment Manufacturing → Import → Brand/Retailer → Consumer

Several countries and numerous independent companies may participate in transforming one agricultural raw material into a finished textile product.

Every step serves an economic purpose.

But every additional step also creates another transfer of custody that must be documented if the origin of the fiber is going to remain verifiable.

COUNTRY OF ORIGIN IS NOT FIBER ORIGIN

This creates an important distinction.

The country-of-origin label on a finished garment does not necessarily tell us where its cotton was grown.

A garment may correctly carry the manufacturing origin required for the finished product while containing cotton grown in an entirely different country.

The yarn may have been produced somewhere else again.

The fabric may have crossed another border.

Dyeing and finishing may have occurred somewhere else.

The finished garment label can therefore be completely accurate while providing relatively little information about the agricultural supply chain behind the product.

That is why country of origin and chain of custody should not be confused.

One tells us where the finished product legally originated.

The other tells us where the material came from and whether we can verify its journey.

EVERY HANDOFF CREATES ANOTHER VERIFICATION POINT

Global textile manufacturing has developed around efficiency, specialization and cost. There is nothing inherently wrong with a multi-country supply chain.

But complexity has consequences.

Every border crossing, ownership transfer, manufacturing facility and production lot creates another point where documentation must remain connected to the original fiber.

Cotton can be consolidated. Fiber can be blended. Yarn lots can contain multiple bale origins. Fabric production introduces additional manufacturing records. Dyeing, finishing, cutting and sewing add still more transactions and production lots.

Verification therefore becomes progressively dependent on the integrity and compatibility of records maintained by numerous independent companies operating across multiple legal jurisdictions.

The question is no longer simply whether traceability technology exists.

How complicated is the supply chain we are asking that technology to verify?

AMERICAN PIMA STARTS WITH AN ADVANTAGE

American Pima is uniquely positioned within this discussion.

American Pima cotton is grown in the United States under some of the world's most rigorous and transparent agricultural standards. That provides an early foundation of accountability that many other supply chains lack.

But even that advantage only reaches the consumer if we can maintain the connection from field to finished product.

It is a relatively small, geographically concentrated crop produced primarily in California, Arizona, New Mexico and Texas. Its premium fiber characteristics already differentiate it from commodity Upland cotton.

That creates an opportunity to preserve identity much closer to the agricultural source.

At the farm and gin level, the industry already possesses many of the building blocks required for meaningful traceability: grower identity, production location, gin records, permanent bale identification, USDA classification data and commercial transaction records.

The challenge is maintaining that identity after the bale leaves the gin.

And that is where supply-chain architecture becomes important.

THE WESTERN HEMISPHERE OPPORTUNITY

Imagine an American Pima supply chain designed specifically around verification.

U.S. Grower → U.S. Gin → U.S. Spinner → Yarn → Western Hemisphere Fabric Production → Dyeing & Finishing → Western Hemisphere Garment Manufacturing → U.S. Brand/Retailer → Consumer

The important difference is not simply geography.

It is supply-chain compression.

Keeping American Pima within the Western Hemisphere from field to finished product could significantly reduce the number of countries, ocean crossings, intermediaries and independent custody transfers involved in producing a finished textile.

That creates a much cleaner verification pathway.

Instead of attempting to reconstruct the movement of U.S. cotton through a long global manufacturing chain, the industry could deliberately design a shorter regional chain in which verification is incorporated from the beginning.

VERIFICATION HAS ECONOMIC VALUE

This is where traceability moves beyond sustainability messaging.

A cleaner chain of custody has potential commercial value.

Brands increasingly need to substantiate claims involving fiber origin, sourcing practices, labor standards and environmental performance.

Governments are placing greater scrutiny on textile supply chains. Retailers face reputational risk when sourcing claims cannot be substantiated.

Under those conditions, the ability to say "American Pima" is valuable.

The ability to prove it from field to finished product is potentially more valuable.

And the ability to demonstrate that the cotton remained within a transparent Western Hemisphere manufacturing system throughout its transformation creates another level of differentiation.

The premium would no longer rest entirely on fiber length, strength, uniformity or spinning performance.

Part of the value would reside in the integrity of the supply chain itself.

A CLEANER CHAIN PRODUCES A STRONGER CLAIM

Consider the difference between two finished products.

Both may legitimately contain American-grown Pima cotton.

The first travels through several countries and numerous manufacturing facilities before reaching the consumer. Verification depends upon maintaining documentation across every transfer.

The second begins with an identified American Pima grower, moves through a documented U.S. gin and remains within an intentionally designed Western Hemisphere textile and apparel manufacturing network.

Both products can contain excellent fiber.

But they do not necessarily provide the same level of supply-chain confidence.

The second product has a shorter story to verify because it has a shorter physical chain to verify.

FROM TRACEABILITY TO PROVENANCE

Traceability answers:

Can we follow the product backward?

Provenance goes further:

Can we demonstrate where the product came from and preserve that identity throughout its transformation?

American Pima has the opportunity to deliver both.

Its relatively concentrated production geography, permanent bale identification, established USDA classification infrastructure and premium market position provide an unusually strong agricultural starting point.

A Western Hemisphere manufacturing strategy could extend that identity beyond the bale.

The result would not simply be American cotton exported into the global textile system.

It could become a deliberately constructed supply chain:

American-grown fiber.
Documented from the field.
Identity preserved through manufacturing.
Manufactured within the Western Hemisphere.
Verified through to the consumer.

That represents a fundamentally different value proposition.

THE NEXT PREMIUM MAY BE VERIFICATION

American Pima has historically earned its premium because of what the fiber is.

Length. Strength. Fineness. Uniformity. Spinning performance.

Those characteristics remain fundamental.

But increasingly, brands and consumers also want to understand where materials came from and how they moved through the supply chain.

That creates the possibility of a second dimension of value.

Fiber quality creates the product premium. Verified provenance can protect — and potentially expand — that premium.

Recent agricultural recalls demonstrate how valuable a transparent chain of custody becomes when someone suddenly needs to know exactly where a product originated and where it traveled.

Cotton faces different risks, but the lesson remains relevant.

In a global textile system built around increasingly complex sourcing networks, the competitive advantage may not always belong to the supply chain capable of adding another layer of verification.

It may belong to the supply chain that is simpler to verify in the first place.

For American Pima, a 100% Western Hemisphere field-to-consumer model could provide exactly that opportunity.



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AMERICA'S FINEST COTTON



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Tracking market movements that impact value.

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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, Supply and Export Demand

Benchmarking American Pima against competing fibers—tracking fiber values, premiums and market relationships to measure American Pima's competitive advantage.

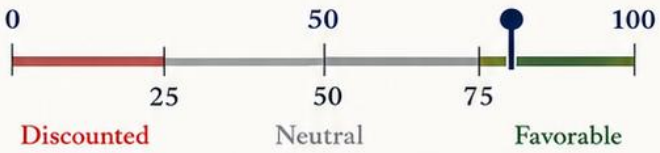
WEEK ENDING AUGUST 21, 2026

EXECUTIVE SUMMARY

American Pima's value position remains constructive. The $0.8265/lb premium over Upland remains above the five-year average, while reduced acreage and ending stocks of 101,000 bales support favorable supply fundamentals. Week 2 commitments reached 166.3K bales, 76.8% ahead of last year, although accumulated shipments remain behind the early 2025/26 pace.

- Total Commitments: 166.3K bales, +76.8% YoY
- Ending Stocks: 101,000 bales
- Pima/Upland Spread: $0.8265/lb
- Overall Outlook: Favorable

AMERICAN PIMA VALUE POSITION



+$0.8265/LB

PREMIUM OVER UPLAND

Long-Staple Premium Ratio: 194%

Five-Year Average: 199%

Outlook: FAVORABLE

FIBER MARKET BENCHMARKS

INDICATOR	CURRENT	COMPARISON / SIGNAL
American Pima Landed SE Asia	$1.86	Premium
American Pima Spot	$1.71	Premium
Organic Pima	$2.30	Premium
Israel ELS Landed	$1.85	Premium
Xinjiang Long Staple Type 137	$1.81	Premium
Giza 94 Landed	$1.50	Neutral
Upland Spot	$0.8835	Discount
Polyester Staple Fiber	$0.51	Discount
WTI Crude Oil	$87.06	External Cost Signal

SUPPLY & DEMAND

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

COMMITMENTS	ACREAGE VS 2024	PRODUCTION VS 2024
+76.8% YoY	−26.2%	−15.3%

DEMAND & CURRENT FACTS

Total Commitments	166.3K
Last Year Same Week	94.1K
Net Sales Week 2	5.9K
Weekly Exports	6.9K
Unshipped Commitments	153.4K

WEEK 2 TRADE DETAIL

NEW SALES BY MARKET
THOUSAND RUNNING BALES

India	3.9
Vietnam	1.8
Peru	0.5
Thailand	0.4
Pakistan	0.2
Other / Buy-Backs	−0.9
TOTAL	5.9

EXPORTS BY MARKET
THOUSAND RUNNING BALES

India	2.7
Pakistan	2.4
Turkey	0.6
All Other	1.2
TOTAL	6.9

Sources: USDA FAS Export Sales Report; Supima Weekly Pima Market Report; SunSirs; Trading Economics; PCIA estimates.
Data as of August 21, 2026.
Dashboard Sponsor: CALCOT Cotton Marketing Services.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 2 · Ending August 13, 2026 · MY Aug 2026 – Jul 2027 · Week 2

Week two adds 5.9k as the 2026/27 book climbs to 166.3k — 77% ahead of last year, with a third of last season's total already committed

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

NET SALES	WEEKLY EXPORTS	TOTAL COMMITMENTS	SHIPPED TO DATE	OUTSTANDING SALES
5.9 k RB	**6.9** k RB	**166.3** k RB	**7.8** %	**153.4** k RB
▼ 44.7 incl. 1.1k buy-backs	▲ 0.8 vs 6.0	▲ 76.6% YoY LY 94.1	12.9 of 166.3 · LY 17.6%	▼ 1.0 needs -3.1k/wk over 50 wks

THIS WEEK IN THE MARKET

Demand settled into a rhythm and the gap kept widening. After the 50.6k opener, week two brought 6.9k of new sales against 1.1k of buy-backs — 5.9k net. India added 3.9k to reach 68.9k (2.3× its year-ago book) and Vietnam re-engaged with 1.8k after sitting out the opening week, lifting total commitments to 166.3k versus 94.1k at this point last year.

Breadth is holding beyond the anchors. Peru (0.5k), Thailand (0.4k) and Pakistan (0.2k) all wrote new-crop business, keeping the buyer list wider than a typical August. Two weeks in, 33.6% of last season's entire commitment is already on the books.

Shipments are building, if behind last year's early pace. Exports of 6.9k RB (India 2.7k, Pakistan 2.4k, Turkey 0.6k) took accumulated shipments to 12.9k — 22% behind last year's fast start of 16.5k, and 7.8% of a book that is 77% larger. The two-week average of 6.5k/wk runs at twice the pace needed to clear it.

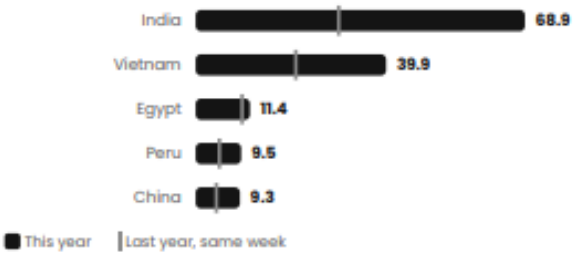
› Two weeks in, commitments of 166.3k are +76.6% YoY — momentum from the record forward book is compounding, not fading.

› India holds 41% of the book at 68.9k; Vietnam's return (+1.8k) keeps concentration from rising further.

› Accumulated exports trail last year by 22% — worth watching, but shipping runs at 2× the required pace.

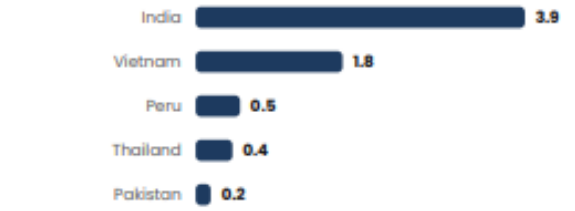
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



WEEK 2 NEW SALES BY MARKET

k RB, net new business



SEASON SHIPMENT PROGRESS

% of commitments shipped



Season outlook: 50 weeks remain. The 153.4k RB order book needs -3.1k/wk to clear; the first two weeks averaged 6.5k. The early export gap to last year (12.9k vs 16.5k) is a pace note, not yet a concern, given the book is 77% larger.

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 15

The Supima index's trailing twelve months now stands at **$213M** after upward panel revisions (July restated to $18.9M). Nordstrom snapped back **+44.9% to $1.70M** on 34.5k units as back-to-school demand arrived — long-sleeve styles now hold the top slot outright — while Original Favorites held its ~10% price increase with volume easing just 8% to $72K.

Market Index

SUPIMA-TAGGED · 81 BRANDS



$213M TTM

1,264 tagged products, monthly. Top users: Nordstrom, Kohl's, Ariat, SPANX, Original Favorites. July $18.9M is the best non-holiday month on record.

Nordstrom

OWN-LABEL SUPIMA® · 106 SKUS



$1.70M

▲ 44.9% WoW

34,512 units

Back-to-school inflection: the LS V-neck led at $365K and fall styles top the line across 106 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

30-day leaders unchanged; OF's raised $42.93 tee held volume — the price increase is sticking.

Sources & method: USDA FAS Export Sales Reporting, CWR, American Pima raw cotton, wk 2 ending 08/13/2026 (MY 26/27) · Particl retail estimates (modeled): market index = Supima-tagged; brand cards = Supima-titled, windows Aug 9–15 vs Aug 2–8. DTC/e-commerce panel only — major Supima users outside it are not reflected. Prior-year = USDA prev-MY columns.

GLOBAL MARKET WEEK IN REVIEW

Outside Markets Influencing American Pima Cotton

A weekly reading of currency, energy, cotton values, freight, interest rates and China manufacturing demand.

WEEK ENDING AUGUST 21, 2026

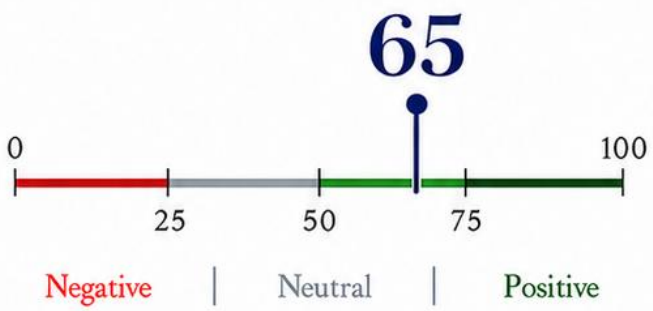
Executive Summary

Outside-market conditions remain moderately positive for American Pima. A softer U.S. dollar continues to improve export competitiveness, while stronger cotton values and lower ocean freight support the delivered-price position. The dollar closed near 98.80, ICE Cotton No. 2 finished at 88.35 cents per pound and the Freightos Baltic Index eased to $3,570.80.

Energy and financing costs remain the principal offsets. WTI crude closed near $87.06 per barrel and the 10-year Treasury yield rose to 4.74%. China's official manufacturing PMI remained at 49.2, keeping China demand the primary headwind and principal risk to textile demand.

The PMEI held at 65 this week. The 30–90 day balance remains moderately positive, supported by currency, cotton values and freight, but sensitive to energy costs, interest rates and Asian demand.

Pima Market Environment Index



MODERATELY POSITIVE

Weekly: Stable | 90-Day: Moderately Positive | Change: 0

Primary Risk: China Demand

GLOBAL MARKET SNAPSHOT

INDICATOR	CURRENT	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	$87.06	Rising	Headwind
U.S. Dollar Index (DXY)	98.80	Falling	Positive
ICE Cotton No. 2	88.35¢	Firm	Positive
Polyester Staple Fiber	$0.51/lb	Neutral	Neutral
Ocean Freight (FBX)	$3,570.80	Softening	Positive
U.S. 10-Year Treasury	4.74%	Rising	Headwind
China Manufacturing PMI	49.2	Contracting	Primary Headwind

Competitive Position: Moderately Positive

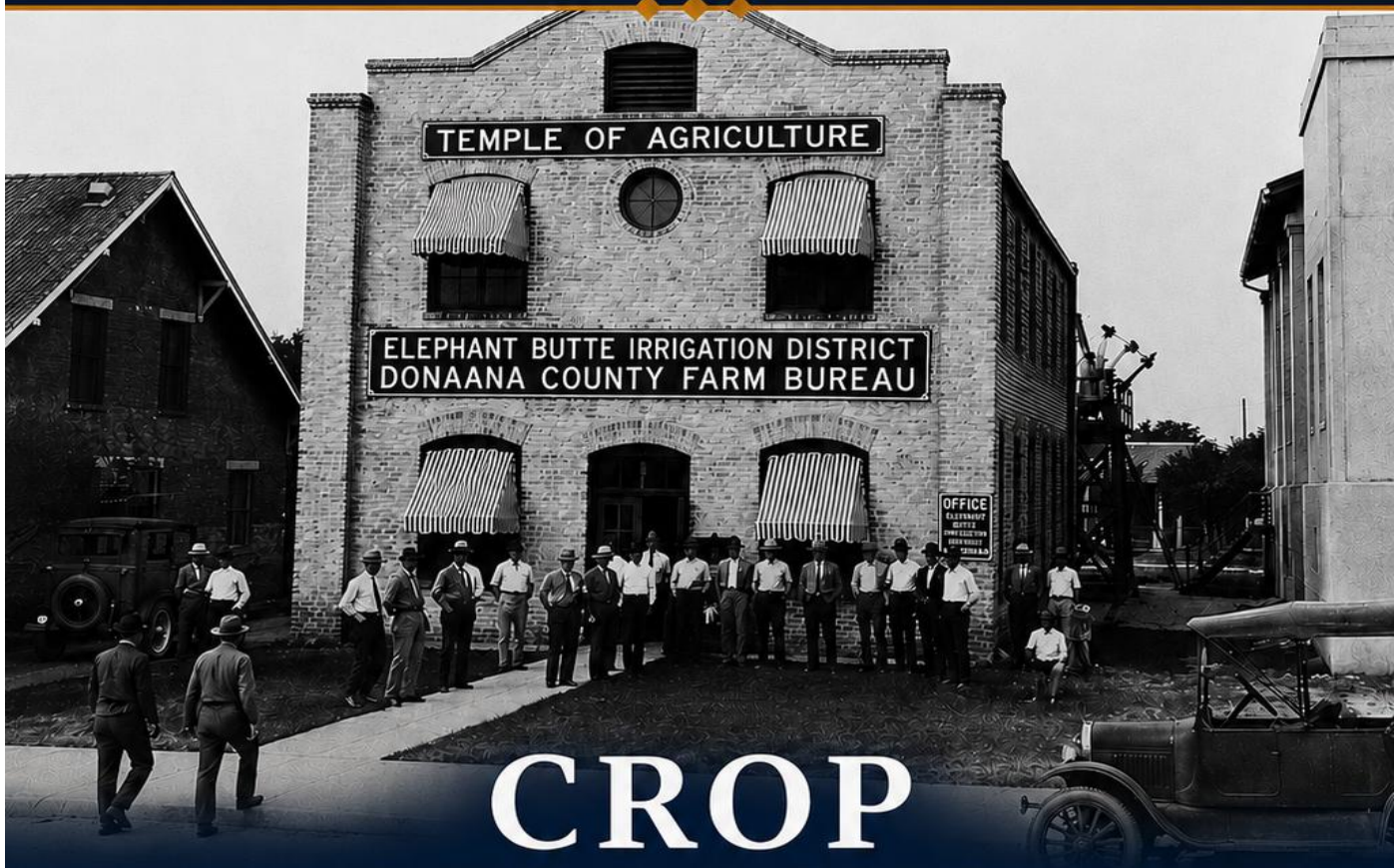
PMEI is a comparative market–environment index; it is not a price forecast or stand–alone demand model.

Sources: Trading Economics; Freightos Baltic Index; SunSirsz; China NBS.
Overnight-finalized data for August 21, 2026.

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AMERICA'S FINEST COTTON



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

American Pima Production Update

USDA crop development, condition and regional field intelligence across the American Pima belt.

REPORT DATE 8-17-26
WEEK ENDING 8-21-26

Executive Field & National Crop Summary

The U.S. Upland crop fell to its lowest condition reading of 2026 at 38% Good to Excellent, near the stressed 2022/23 level of 37.26% and well below 56.4% one year ago. Nearly every state was downgraded; Arizona and Kansas recorded the largest deterioration, while California was unchanged. National development remains near normal: 97% squared, 74% setting bolls and 14% open. Within the Pima belt, California remains the benchmark at 95% Good to Excellent; Arizona fell 22 points to 69%, and Texas fell seven points to 21%.

U.S. Pima yield is projected at 1,333 lb/acre versus 1,405 in 2025 – a decline of 72 pounds, or 5.1%.

U.S. UPLAND CONDITION

38% G+E



Lowest of 2026

Year Ago: 56.4%

USDA PIMA-BELT PROGRESS SCORECARD

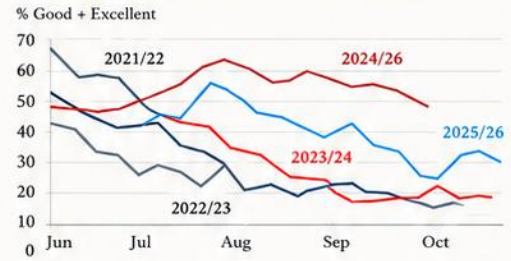
STATE	SQUARING 2026 / AVG.	SETTING BOLLS 2026 / AVG.	BOLLS OPEN 2026 / AVG.	GOOD + EXCELLENT	WEEKLY TREND
CALIFORNIA	100 / 100	80 / 80	0 / 0	95%	UNCHANGED
ARIZONA	100 / 100	95 / 98	59 / 47	69%	DOWN 22 PTS
TEXAS	95 / 95	64 / 71	17 / 18	21%	DOWN 7 PTS
NEW MEXICO	N/A	N/A	N/A	N/A	NOT REPORTED

2026 / AVG. compares Aug. 16, 2026 with the 2021–2025 average.
New Mexico is not separately reported by USDA NASS.

PIMA-BELT CONDITION TREND



MULTI-YEAR CONTEXT



2026: 38.0% G+E · YEAR AGO: 56.4%
Current series is near the stressed 2022/23 crop.

CALIFORNIA – LEADING:
Boll set matches average; condition holds at 95% G+E.

ARIZONA – RAPID MATURITY:
59% open versus 47% average; condition fell 22 points.

TEXAS – PRIMARY RISK:
Boll set trails average by 7 points; 39% is Poor or Very Poor.

Sources: USDA NASS Crop Progress; Pima Growers field intelligence.

AMERICAN PIMA SUPPLY OUTLOOK

USDA August 2026 Update

Modest reduction in production outlook; strong yield potential across the Pima belt.

REPORT DATE AUGUST 12, 2026



EXECUTIVE SUMMARY

USDA's August 2026 estimates project U.S. American Pima production at 399,000 bales, down slightly from July but up 9% from 2025/26. Total planted Pima acreage is estimated at 148,000 acres and harvested acreage at 144,000 acres. Average yield is forecast at 1,333 pounds per harvested acre, up 116 pounds from last season.

California remains the backbone of production with 95,000 planted acres and an estimated 310,000 bales. Texas follows with 28,000 planted acres and 45,000 bales; Arizona is projected at 15,000 planted acres and 28,000 bales; New Mexico at 10,000 planted acres and 16,000 bales.

KEY TAKEAWAYS

PRODUCTION —
399,000 bales; up 9% versus 2025/26.

YIELD —
1,333 lbs./acre; up 116 lbs. from last year.

REGIONAL SHARE —
California 310,000 bales (78%), Texas 45,000, Arizona 28,000, New Mexico 16,000.

MARKET POSITION —
Strong yield potential and favorable conditions support a high-quality crop across the Pima belt.

2025/26 AMERICAN PIMA PRODUCATION ESTIMATE

Region	May Final Acres	March Estimate Acres	June Estimate Acres	August Estimate Acres	Harvested Acres	Yield lbs.	Production 1,000 bales
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 opportunity is not simply to produce more Pima.
It is to produce more Pima that deserves the premium.

U.S. PIMA COTTON BALANCE SHEET

August 2026 WASDE Update

Tight ending stocks and export-led demand continue to support the American Pima market.

REPORT DATE AUGUST 12, 2026



EXECUTIVE SUMMARY

The 2026/27 U.S. Pima balance sheet reflects a modest tightening in supply. Beginning stocks are projected at 107,000 bales, production at 399,000 bales and total supply at 506,000 bales. Exports are projected at 400,000 bales—approximately 99% of total demand—while domestic consumption remains limited at 5,000 bales. Ending stocks are projected at 101,000 bales, near historic lows.

Lower production and minimal imports reinforce an export-driven market structure. Strong global demand remains the foundation of the U.S. Pima cotton market.

KEY TAKEAWAYS

TIGHT STOCKS —
Ending stocks: 101,000 bales.

PRODUCTION —
399,000 bales; down 6,000 from 2025/26.

EXPORT FOCUS —
400,000 bales; approximately 99% of total demand.

BOTTOM LINE —
Limited ending stocks continue to support premium value and market resilience.

U.S. PIMA COTTON BALANCE SHEET SUMMARY

IN 1,000 480-LB BALES

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

The 2026/27 balance sheet reflects a slight tightening in supply, with lower production and minimal imports keeping ending stocks near record lows.

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

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AMERICA'S FINEST COTTON

AMERICAN PIMA LOAN VALUE GUIDE

2026 CROP ELS (AMERICAN PIMA COTTON)

Source: USDA Farm Service Agency (FSA)

Published by PCIA • Presented by PIMA GROWERS

Schedule of Loan Rates for Eligible Qualities

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

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

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

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

BENCHMARK QUALITY

Grade 2 • Leaf 2
Staple 48+

LOAN VALUE

101.70¢/LB

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

QUALITY ADJUSTMENTS (DISCOUNTS)

LEAF DISCOUNTS (POINTS PER POUND)

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

MICRONAIRE DISCOUNTS (POINTS PER POUND)

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

STRENGTH DISCOUNTS (POINTS PER POUND)

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

EXTRANEOUS MATTER PENALTIES (POINTS PER POUND)

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

PIMA QUALITY TARGETS

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

KEY TAKEAWAY

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

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

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

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

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

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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.

COTTON THERMAL STRESS

Heat Exposure Across the American Pima Belt

A screening index for comparing cumulative day and night heat exposure—not a stand-alone yield-loss model.

DATA THROUGH AUGUST 21, 2026

Executive Summary

Heat stress remains widespread across the American Pima belt. Safford leads with 98 total stress points, followed by El Paso 82, Deming 70, Fresno 68 and Lubbock 66.

Daytime heat remains the principal driver. Safford recorded 13 qualifying warm nights and El Paso 10; Fresno and Lubbock recorded one each, while Deming recorded none. Interpret results with crop stage, irrigation status, soil moisture, humidity, canopy temperature, wind, fruit load and duration of consecutive heat events.

How to Read the Index

Day stress = +1 when Tmax ≥ 95°F.

Night stress = +1 when Tmin ≥ 79°F.

If both occur in the same 24-hour cycle, count 2 total points and one combined-stress day.

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	85	13	13	98	◆ High
Fresno, CA	67	1	1	68	◆ High
El Paso, TX	72	10	10	82	◆ High
Lubbock, TX	65	1	1	66	◆ High
Deming, NM	70	0	0	70	◆ High

RISK KEY: High ≥ 35 | Moderate–High 30–34 | Moderate 20–29 | Low–Moderate ≤ 19

Day and night counts use the same airport-station daily summaries and accumulate from the planting dates shown.
Source: Iowa Environmental Mesonet ASOS/AWOS archive.

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

Heat exposure must be interpreted through crop stage and available plant water.

WHEN HEAT BECOMES PHYSIOLOGICAL STRESS

Why Crop Development Matters

Cotton's sensitivity to heat varies by stage. Early growth is influenced by establishment conditions; reproductive stages are most vulnerable; and boll fill is affected by carbohydrate supply and respiration losses. Interpreting heat exposure with crop stage and soil moisture is essential for sound decisions on irrigation and management.

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, dehiscence and fertilization success.

Fruit Retention — Reduced assimilate supply and reproductive injury can increase square and young-boll abscission, often visible several days after the heat event.

Water Demand and Fiber Development — Daytime heat increases evapotranspiration. Adequate soil moisture can protect canopy temperature but does not eliminate evaporative respiration losses. Sustained heat can shorten boll filling, reduce boll and seed weight, and affect fiber length, strength and micronaire.

Crop Development and Heat Sensitivity

Establishment	Squaring	First Bloom	Peak Bloom	Boll Fill	Cutout / Maturity
Heat raises evaporative demand and can slow establishment when moisture is inadequate.	Repeated heat can reduce reproductive capacity and increase irrigation demand before bloom.	Pollen development and fertilization become heat-sensitive; heat begins affecting boll-set potential.	Highest-risk period; daytime heat raises water demand while warm nights increase respiration.	Stress can reduce carbohydrate supply, accelerate shedding, restrict boll weight and shorten effective filling.	New reproductive loss matters less, but severe stress may still limit late boll retention and fiber development.

Pima Growers Interpretation

The thermal index is a screening and comparison tool, not a stand-alone yield-loss model. Heat stress does not cause immediate yield loss; its effects may appear days to weeks later through reduced boll set, increased shedding, smaller bolls and reduced fiber quality.

Data and Scientific Basis

- *Weather data:* Iowa Environmental Mesonet daily summaries derived from ASOS/AWOS airport observations.
- *Uniform method:* daily Tmax and Tmin come from the same station series and local-calendar-day summary.
- *Calculation:* cumulative from each listed planting date; day stress at Tmax ≥ 95°F and night stress at Tmin ≥ 79°F.
- *Scientific basis: Cotton Foundation, Stress Physiology in Cotton; Bayer Crop Science, Cotton Growth & Development.*

Primary data source: Iowa Environmental Mesonet ASOS/AWOS daily summaries.

Stations: KSAD—Safford; KFAT—Fresno; KELP—El Paso; KLBB—Lubbock; KDMN—Deming.

Validation archive: NOAA/NCEI Global Surface Hourly and ASOS/AWOS observations.

Scientific basis: *Cotton Foundation, Stress Physiology in Cotton; Bayer Crop Science, Cotton Growth & Development.*

IRRIGATION STATUS

Crop Water Use and Final-Irrigation Decisions

Weekly decision support for American Pima growers using crop stage, DD60 accumulation, evapotranspiration and available root-zone water.

WEEK ENDING AUGUST 21, 2026

Executive Irrigation Summary

All five regions are moving from early cutout through boll fill and first open boll. Adequate root-zone moisture remains important for finishing harvestable bolls, but irrigation should taper with crop stage and boll maturity. Stage-adjusted daily crop ET ranges from 0.30 to 0.40 in/day. Effective rainfall provided partial relief at El Paso, Deming and Safford; Fresno and Lubbock remained essentially dry. Final-irrigation decisions should be based on mature harvestable bolls, measured root-zone moisture, forecast conditions, NAWF below 4 and boll-opening percentage—not the calendar alone.

PIMA IRRIGATION INDEX

7.2

HIGH



Average Weekly Irrigation Need: 2.4 in

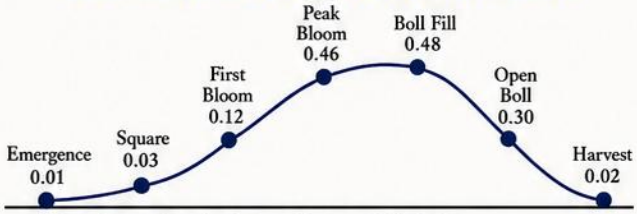
Planning Status: High

REGIONAL IRRIGATION DECISION TABLE

Location	Crop Stage / Cumulative DD60	Weekly DD60 Gain	Modeled Daily ETc (in/day)	Effective Rain (in)	Root-Zone Water Status	Weekly Irrigation Need (in)	Remaining Seasonal Water—Estimate (in)
Deming, NM	Boll Fill / Early Open Boll — 1,832	+118	0.30	0.16	Field Check	1.94	5.7
Fresno, CA	Cutout / First Open Boll — 1,967	+122	0.30	0.00	Field Check	2.10	4.8
El Paso, TX	Early Cutout / Boll Fill — 1,721	+138	0.40	0.20	Field Check	2.60	3.6
Safford, AZ	Early Cutout / Boll Fill — 1,679	+143	0.40	0.08	Field Check	2.72	3.1
Lubbock, TX	Early Cutout / Boll Fill — 1,390	+138	0.38	0.00	Field Check	2.66	3.3

DD60 uses a 60°F base with an 86°F upper-temperature threshold; weekly gains are carried forward from the August 14 baseline. ETc uses the locked crop-stage demand curve shown below. Root-zone water requires field measurement. Effective rain is estimated at 85% of observed rainfall.

SEASONAL COTTON WATER DEMAND



Water demand peaks during bloom and boll fill; protect soil moisture in the root zone while finishing harvestable bolls.

FINAL-IRRIGATION DECISION

- ✓ Final harvestable bolls are mature.
- ✓ Adequate soil moisture remains in the root zone.
- ✓ Weather forecast supports cutoff.
- ✓ NAWF is below 4.
- ✓ A high percentage of bolls are open.

Taper irrigation to crop demand—do not terminate by calendar date alone.

SOIL-WATER HOLDING 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 for ET demand, crop stage, field conditions and irrigation system.

Weather: Iowa Environmental Mesonet ASOS/AWOS daily summaries—KSAD, KFAT, KELP, KLBB and KDMN. Validation: NOAA/NCEI.
Methods: modified DD60 with 86°F upper threshold; stage-adjusted ETc; Cotton Foundation and Bayer Crop Science guidance.

REGIONAL WEATHER STATUS

Heat, Rainfall and Crop Development Across the American Pima Belt

Weekly weather exposure and precipitation intelligence for California, Arizona, New Mexico and West Texas.

WEEK ENDING AUGUST 21, 2026

Executive Weather Summary

Heat remained elevated across the American Pima belt. Safford reached 105°F, and El Paso recorded the week's only qualifying warm night at 79°F. Weekly rainfall was limited: El Paso received 0.23 inch, Deming 0.19 and Safford 0.09; Fresno and Lubbock were essentially dry. YTD station departures show Lubbock with the largest deficit, while El Paso is the only location slightly above normal.

Management focus: heat exposure, measured root-zone moisture and stage-based irrigation tapering while harvestable bolls finish.

REGIONAL WEATHER RISK

Lower | Elevated | **High** | Extreme

Primary Risk: Heat + Moisture Deficit

Largest YTD Deficit: Lubbock −3.42 in

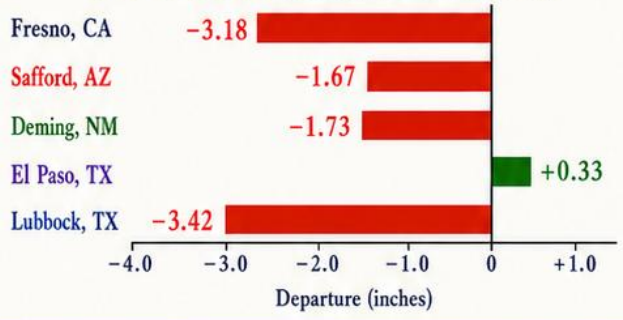
Only Above Normal: El Paso +0.33 in

REGIONAL WEATHER & CROP MATRIX

Location	High / Low °F	7-Day Rain / Effective Rain (in)	2026 YTD / Departure (in)	Weekly DD60 Gain	Crop Stage	Weekly Irrigation Need (in)
Fresno, CA	93–104 / 64–72	0.00 / 0.00	4.54 / −3.18	+122	Cutout / First Open Boll	2.10
Safford, AZ	100–105 / 71–77	0.09 / 0.08	2.97 / −1.67	+143	Early Cutout / Boll Fill	2.72
Deming, NM	96–101 / 64–77	0.19 / 0.16	3.97 / −1.73	+118	Boll Fill / Early Open Boll	1.94
El Paso, TX	91–102 / 67–79	0.23 / 0.20	5.43 / +0.33	+138	Early Cutout / Boll Fill	2.60
Lubbock, TX	96–101 / 66–75	0.00 / 0.00	8.65 / −3.42	+138	Early Cutout / Boll Fill	2.66

Temperature and rainfall use IEM ASOS/AWOS daily summaries from the same five airport stations. Effective rain = 85% of observed rainfall. Modified DD60 uses a 60°F base and 86°F upper threshold. Irrigation need uses stage-adjusted ETc less effective rain.

YTD PRECIPITATION DEPARTURE



DROUGHT & CLIMATE OUTLOOK

Latest U.S. Drought Monitor: conditions valid August 18 continue broad dryness across the West and Southern Plains.

Regional interpretation: Fresno, Safford and Deming remain below their station precipitation normals. El Paso holds a slight YTD surplus, while Lubbock carries the largest deficit.

ENSO update: July Niño 3.4 was +1.4°C. NOAA CPC gives greater than a 90% chance of a very strong El Niño during fall and winter 2026–27.

Late-season implication: near-term extreme heat remains a risk; Texas favors continued dryness while the Southwest may receive intermittent monsoonal relief.

CALIFORNIA — HEAT

Fresno remained dry this week and is 3.18 inches below normal YTD.

SOUTHWEST — LIMITED RELIEF

El Paso received the most rain; Deming and Safford remain below normal.

WEST TEXAS — PRIMARY RISK

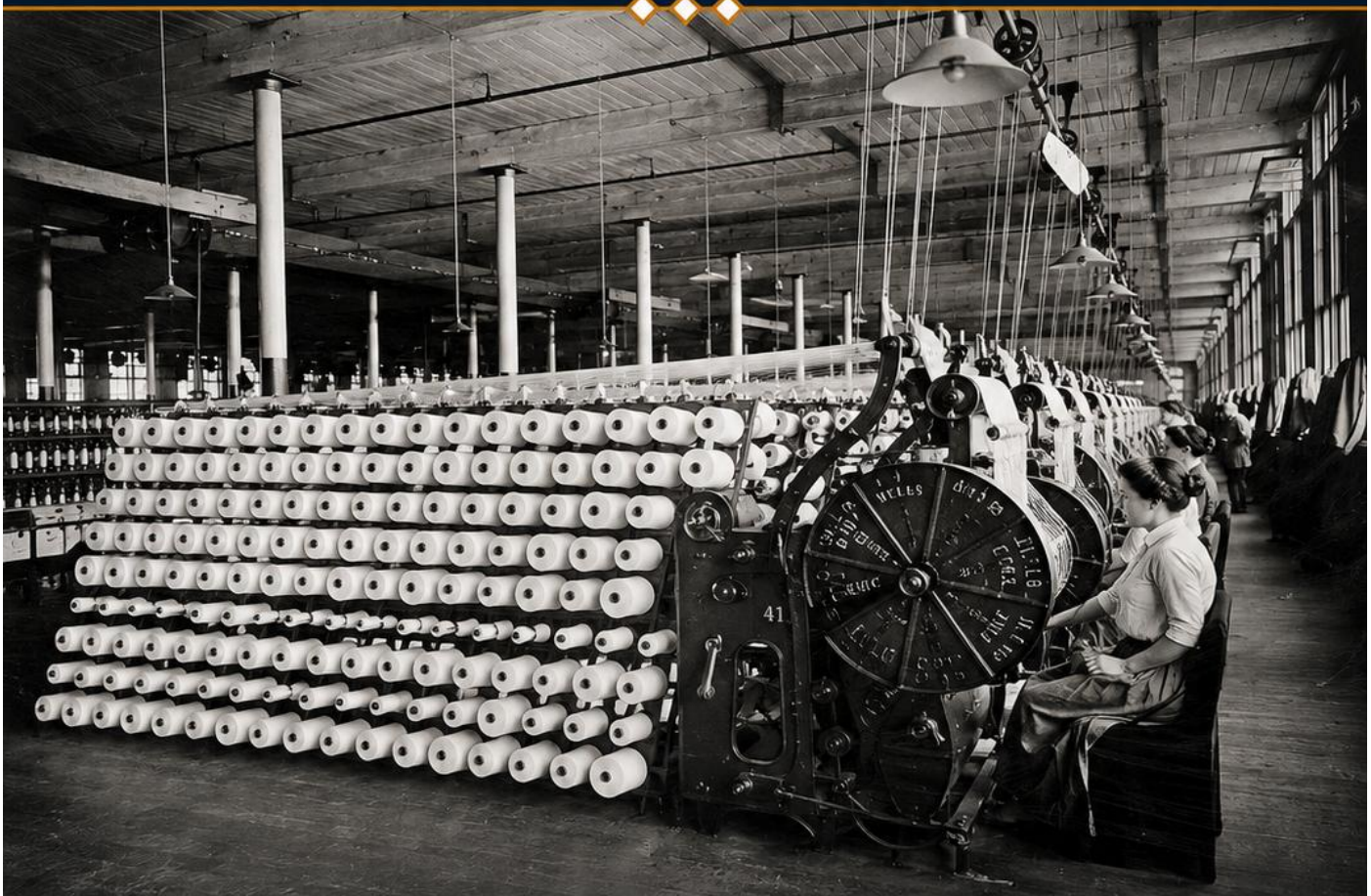
Lubbock is 3.42 inches below normal with no measurable weekly rain.

Weather and precipitation: Iowa Environmental Mesonet ASOS/AWOS daily summaries—KSAD, KFAT, KELP, KLBB and KDMN. Validation: NOAA/NCEI. Methods: modified DD60 with 86°F upper threshold; effective rain at 85%; stage-adjusted ETc. Outlook: U.S. Drought Monitor and NOAA CPC. Data through August 21, 2026.

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CALIFORNIA UPDATE

WEEK ENDING 8-21-26








California's Pima crop is progressing well. Most fields range from cutout to the first open boll, with 27–30 total nodes and 3–7 nodes above bloom.

Early yield estimates suggest an above–average crop, although production may be slightly below 2025 levels. Final irrigations are now being scheduled.

If El Niño begins influencing weather conditions this fall, a timely harvest will be critical to protecting fiber quality—something we will continue to monitor closely.

WEST TEXAS FIELD REPORT

Crop Development, Pest Activity and Irrigated-Acre Outlook

On-the-ground observations and management considerations for West Texas Pima growers.

WEEK ENDING AUGUST 21, 2026



COTTON CROP & PEST SITUATION

Update by Kerry Siders, Ph.D. – Texas A&M AgriLife Extension | August 21, 2026

Cotton ranges from +5 nodes above white flower to hard cutout (0 nodes above white flower). Ideally cotton should be blooming out the top because the chance of a bloom developing into a quality- and yield-contributing boll has dropped considerably.

Many fields are shedding squares and small bolls as a natural adjustment to carrying capacity; verify shedding is not insect induced.

A few bollworms are being found in non-Bt cotton, generally below the 6% treatment threshold. Adult stink bugs and numerous egg clusters are present. Lygus are not being found.

Cotton aphids are more consistent after being absent for nearly a month; beneficial insects are reduced. Fields checked ranged from 0 to 35 aphids per leaf and averaged 7 per leaf.

Before cracked boll, use 40–70 aphids per leaf, with 50 aphids per leaf as the working threshold. Once bolls are cracked, the threshold drops to 10 aphids per leaf.

Continue scouting for another couple of weeks.

By the first week of September, most cotton should have accumulated well over 400 heat units since reaching fewer than 5 nodes above white flower on August 7, indicating the crop is safe from most insect damage apart from cotton aphids.

Texas Cotton Insect Guide:
Texas A&M AgriLife Extension.

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

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AUTHENTICITY

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

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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.

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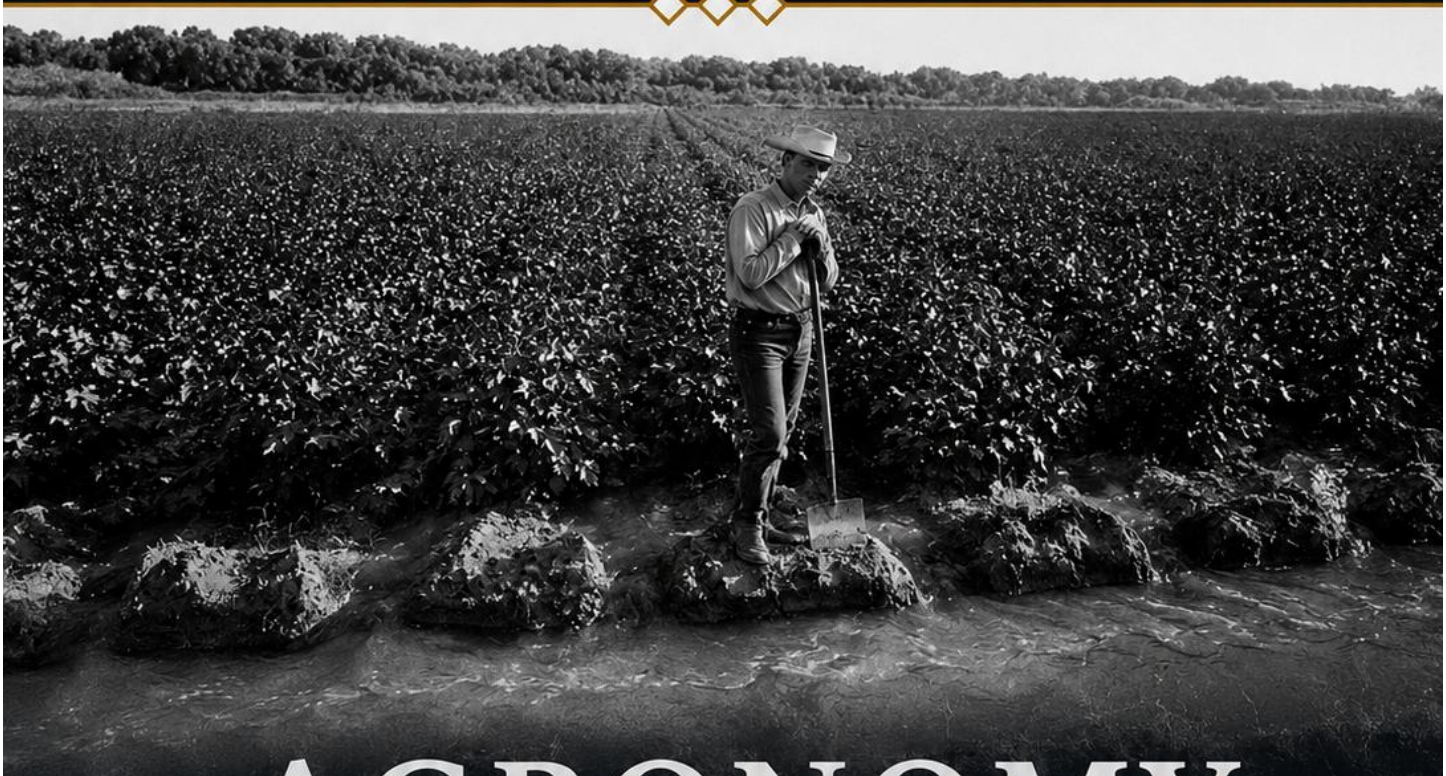
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AMERICA'S FINEST COTTON

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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SOLUTIONS THAT HELP GROWERS SUCCEED.

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FIRST OPEN BOLL

Managing the Final Irrigation

First open boll is a decision point—not an automatic signal to shut off the water.

What First Open Boll Tells Us

The first open boll marks the beginning of the end—but it is not the end. Plant metabolism, boll maturation, and fiber development continue to depend on adequate soil moisture for a meaningful period after that first bolls crack. First open boll should be viewed as a decision point to evaluate soil water, heat unit accumulation, and boll load—not as an automatic irrigation cutoff.

Most bolls that will contribute lint have already set. The priority shifts to finishing those bolls efficiently. Cutting off water too soon can reduce boll size, weaken fiber, and limit yield response. Keeping water on too long can delay maturity, reduce quality, and create unnecessary risk as the season turns.

Smart management is not about a single calendar date. It is about tracking crop development, protecting the last effective boll population, and aligning the irrigation plan with the soil water profile and the weather ahead.

The Physiology Behind the Decision

After flowering, assimilates are partitioned to the developing boll. Fiber cells elongate rapidly during boll expansion, then secondary walls thicken as the boll matures. Both processes are moisture-dependent. Water stress during boll expansion can limit cell number and fiber length. Stress during maturation can reduce boll weight and fiber strength.

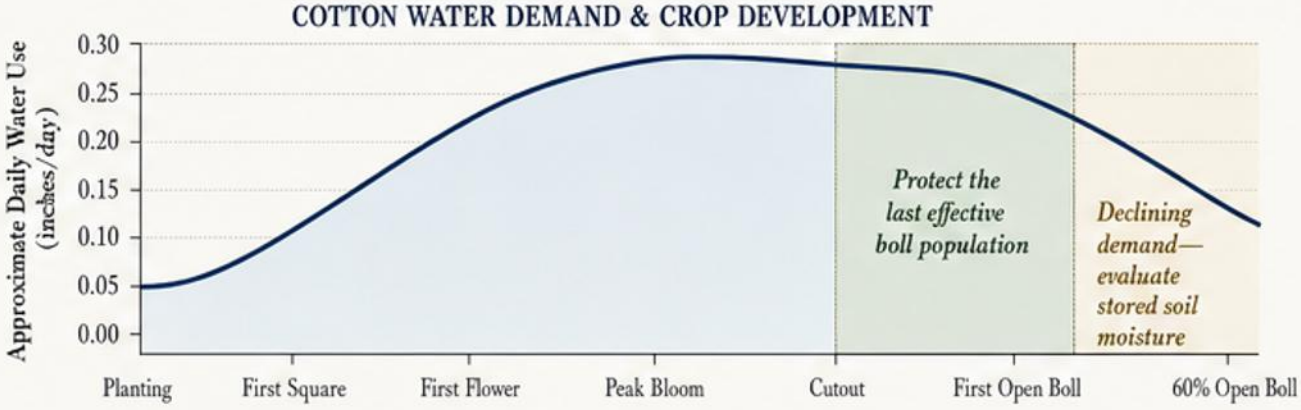
Evaporative demand typically peaks around bloom and early boll filling. As the crop approaches cutout and first open boll, demand naturally declines—but the crop still requires water to complete fiber elongation and maturation of the bolls that will ultimately be harvested.

Heat units (HU) are a reliable clock. Under typical Arizona summer conditions, it takes about 600 HU from last effective bloom to reach a full-sized hard boll. Protecting the crop during that window is essential for maximizing lint yield and quality.

Follow the Last Effective Boll

Identify the last flowers that can produce bolls with time to mature. These "last effective" blooms vary by field, variety, and planting date. Base decisions on heat unit models and field observations—not arbitrary dates.

Maintain adequate soil moisture through boll expansion and into the early stages of maturation. As first open boll appears, evaluate stored soil moisture, forecasted demand, and the remaining HU. Then decide how to taper, maintain, or terminate irrigation.



Source basis: *Cotton Incorporated and National Cotton Council.*

FINISH THE BOLLS—NOT THE PLANT

Why Soil Profile Moisture Matters

Cotton roots extract water from the entire wetted profile. If deeper soil water is available, the crop can continue maturing bolls even as surface soil dries. If the profile is already depleted when first open boll arrives, the crop cannot complete fiber elongation or boll hardening. Check profile moisture before deciding to cut off.

Aim to enter the final 600 HU window with adequate moisture in the root zone. This gives the plant the resources it needs to finish bolls, maintain fiber quality, and avoid premature leaf drop that can compromise yield and ginning performance.

The Risk of Terminating Too Early

Shutting off irrigation at or shortly, after first open boll can shorten the boll-filling period. The result is smaller bolls, lower lint turnout, shorter staple, and reduced fiber strength. Yield penalties from early cutoffs are difficult to recover.

Fields planted early, with long-season varieties or high fruit load, are especially sensitive. When in doubt, protect the last effective boll population and let heat units guide the timing.

The Risk of Irrigating Too Long

Continuing heavy irrigation after bolls are mature can delay defoliation and opening, increase boll rot risk with fall rains, and cause maturity management challenges. Excess water late in the season can also leave soils wetter than desirable for harvest traffic.

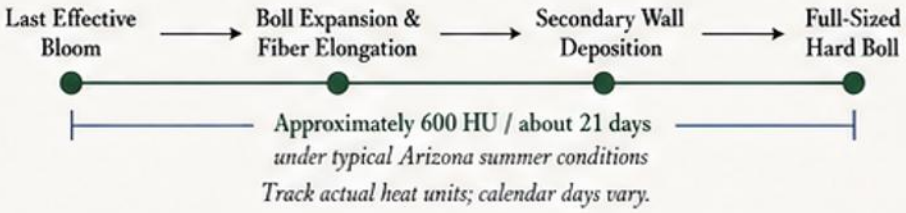
As first open boll progresses toward 60 percent open, evaluate soil moisture and forecast. Taper irrigation to meet demand, not to maintain lush growth. The objective is to finish the bolls, not the plant.

Management Takeaway

First open boll begins the final-irrigation decision. It does not automatically end irrigation. Protect the last effective boll population for about 600 HU with adequate soil moisture. Then taper and stop with enough lead time for the crop to mature and open under favorable conditions.

Let heat units, soil moisture, and field maturity—not the calendar—drive your plan. Finish the bolls, not the plant.

FROM LAST EFFECTIVE BLOOM TO IRRIGATION TERMINATION



First open boll begins the final-irrigation decision. It does not automatically end irrigation.

REGIONAL LAST-EFFECTIVE-BLOOM GUIDANCE		
Approx. West Texas dates	Lubbock area — Aug. 21	Gaines County — Sept. 1
Reference dates only; actual timing varies by year, planting date and seasonal heat accumulation.		
Arizona	No single statewide date	Protect selected final bolls for about 600 HU with adequate moisture
California	Location- and temperature-dependent	Separate San Joaquin Valley from low-desert conditions; late Pima bolls may require an extended maturation period

Sources: NCC Cotton Physiology Today; Cotton Incorporated; Texas A&M AgriLife; University of Arizona Cooperative Extension; University of California Agriculture and Natural Resources.



FIELD SYMPTOMS: stippling, bronzing and marginal decline

LIVE STAGES: adults, immatures and eggs beneath the leaf

LATE-SEASON SPIDER MITES

Protecting the Leaf Area Still Filling American Pima Bolls

Pima Grower Journal Agronomy Series | 8-21-26

Hot, dry weather can turn scattered colonies into a field-wide loss of photosynthetic capacity. The late-season question is not simply whether mites are present, but whether an increasing infestation can still reduce yield before the crop is physiologically safe.

WHY LATE-SEASON MITES STILL MATTER

Spider mites feed on leaf cells, producing stippling that advances to bronzing and premature defoliation. Less green leaf area means less photosynthate to finish bolls. Hot, dusty and water-stressed fields are most vulnerable; colonies often begin at field edges or isolated stressed areas before spreading.

SCOUT THE TREND - NOT JUST THE DAMAGE

Walk at least four areas, including margins and the interior. Turn lower- and mid-canopy leaves and use a hand lens to confirm live mites, eggs and webbing. Record the percentage with active colonies and compare locations at the next visit. Old bronzing can remain after populations decline; recheck hot spots within 3-4 days when conditions favor rapid growth.

PRESERVE THE BIOLOGICAL BRAKES

University of Arizona work emphasizes conserving natural enemies, including western flower thrips that consume mite eggs. UC guidance warns that broad-spectrum insecticides used for other pests can flare mites. Avoid unnecessary sprays, minimize dust and select the least disruptive effective option.

APPLICATION STEWARDSHIP

Match the product to species and life stages; verify the current cotton label and state registration; observe rate, coverage, PHI and resistance limits. Thorough lower-leaf coverage matters. Rotate IRAC groups rather than repeating chemistry, evaluate control promptly and stop treatment when crop maturity makes an economic response unlikely.

LATE-SEASON TREATMENT DECISION

Act when: live mites are widespread and increasing; roughly 30-50% of plants or leaves show active infestation or injury; bronzing is advancing; and meaningful boll filling remains. **Raise the bar or terminate protection** as the crop approaches NAWF 5 + 650-750 DD60s, when additional mite injury is much less likely to reduce yield. Confirm crop maturity, water status and infestation trend - do not spray from a single damaged leaf.

CHEMICAL TREATMENT OPTIONS

VERIFY CURRENT STATE LABEL BEFORE USE

ACTIVE INGREDIENT (EXAMPLE)	IRAC	LATE-SEASON FIT	UC PHI*
Spiromesifen (Oberon)	23	Strong late-season option; eggs/immatures; also suppresses whitefly	30 d
Etoxazole (Zeal)	10B	Best on low, building populations; growth regulator; one use/season	28 d
Abamectin (Agri-Mek)	6	Adults + immatures; resistance documented; generally stronger earlier	20 d
Hexythiazox (Onager)	10A	Eggs/immatures; apply before buildup and before bolls open	35 d
Propargite (Comite)	12C	Contact option; resistance documented; apply before bolls open	50 d

*UC cotton guideline PHIs are planning references; the current product label controls. Avoid pyrethroids/organophosphates for mite control - resurgence can exceed pretreatment levels.

EXTENSION SOURCES: Texas A&M AgriLife Cotton Insect Management Guide; University of Arizona IPM / Ellsworth et al.; UC Statewide IPM Program, Cotton Pest Management Guidelines. Thresholds are decision guides; follow current labels and local Extension advice.



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

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 as the plant directs its energy toward filling developing bolls.

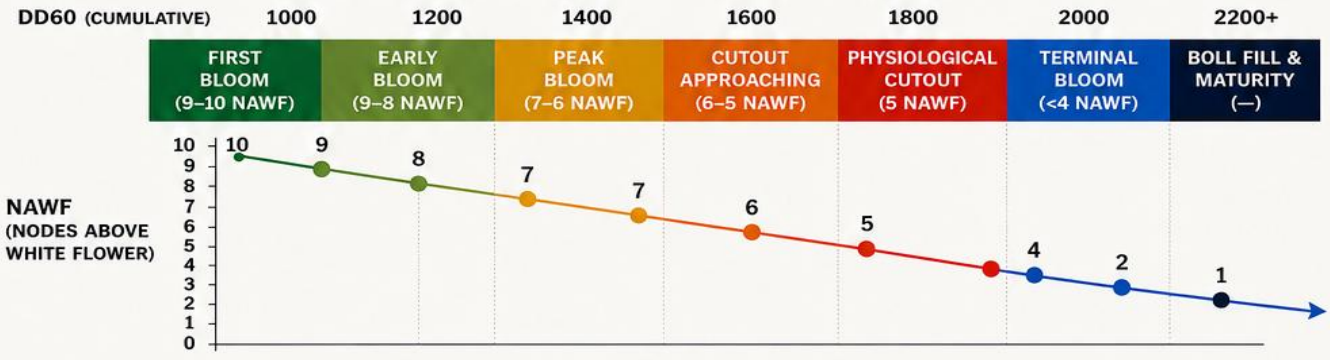
> **"DD60 measures the season. NAWF measures the crop."**

WHY THE MEASUREMENTS WORK TOGETHER

A very 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.

COTTON COUNTDOWN CLOCK — DD60 ↔ NAWF TIMELINE

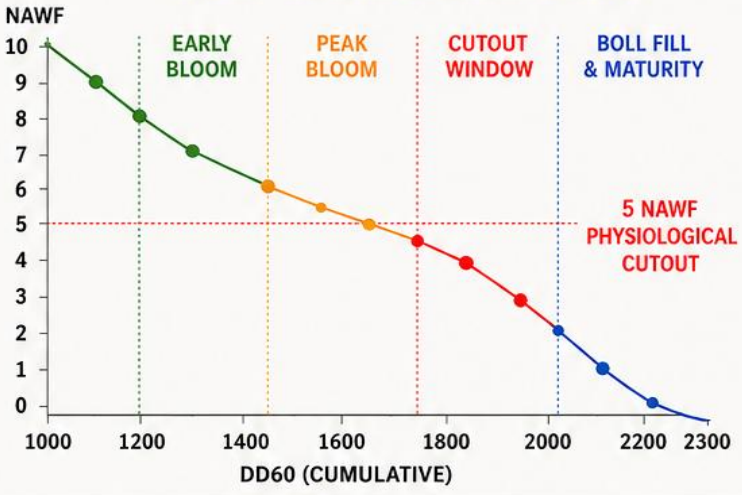


DD60 / NAWF BENCHMARK GUIDE

A practical reference for crop stage, plant activity and management focus.

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 peak water 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.

NAWF COUNTDOWN CURVE



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

When the two measurements agree, development is on track. When they diverge, investigate stress, excess vegetative growth or delayed maturity.

MANAGEMENT PRIORITIES

- Protect square retention during 9–8 NAWF.
- Avoid moisture stress during 7–6 NAWF.
- Begin transition planning at 6–5 NAWF.
- Shift irrigation toward boll filling after cutout.
- Finish efficiently to preserve fiber quality.


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Mid-Week Market Brief

★ NEWS AND INSIGHT FOR THE TEXTILES & APPAREL TRADE ★

WEDNESDAY, AUGUST 19, 2026 VOL. I • NO. 14

★ LEAD STORY ★

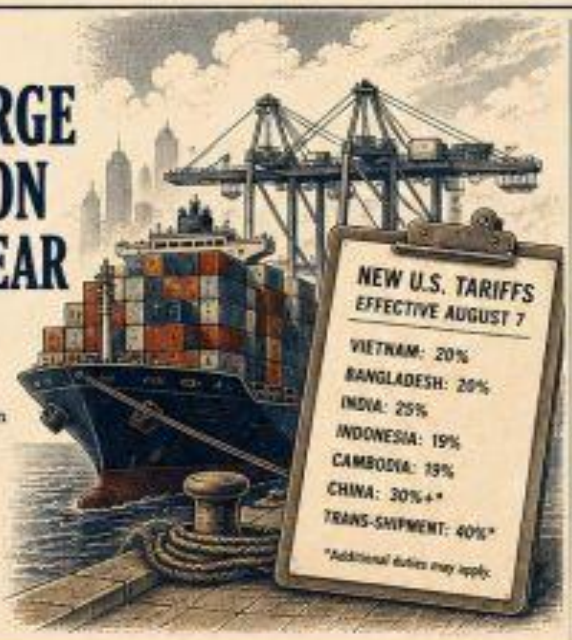
U.S. IMPORTS SURGE AS HOLIDAY SEASON KICKS INTO HIGH GEAR

Strong July import numbers show retailers and brands continue to front-load inventory ahead of the holidays and to beat new tariff costs.

Total U.S. container imports hit 2.5 million TEUs in July— the fourth-highest July on record. China volumes reached 873,129 TEUs, the highest monthly level in a year.[1]

Tariff changes remain top of mind as companies reassess sourcing, pricing strategies, and working capital needs.

Sources: Descartes Datamyne (Aug 10, 2026); Reuters (Aug 10, 2026)



THE WEEK'S READ

July U.S. imports hit 4th-highest July on record.[1]

★

Shein scales back Vietnam push; returns focus to China supply chain.[2]

★

Shein plans Hong Kong IPO as early as Aug. 19; valuation $30B–$40B.[3]

★

U.S. PPI shows apparel costs easing in July.[4]

★

Nike reports Q1 miss; announces leadership transition.[5]

2.5M TEUs — JULY IMPORTS
Total U.S. container imports in July—4th-highest July on record.[1]

873K TEUs — CHINA VOLUMES
China-origin shipments hit highest monthly level in a year.[1]

AUG. 7 — TARIFFS TAKE EFFECT
New U.S. tariff rates apply to key apparel-producing countries.

$30–$40B — SHEIN IPO PLAN
Shein targets Aug. 19 Hong Kong IPO at a lower valuation.[3]

-0.3% — APPAREL PPI (JULY)
U.S. producer prices for apparel fell 0.3% m/m; down 1.5% y/y.[4]

TOP PRIORITY — SUPPLY CHAIN RISK
Retailers cite resilience and compliance as top focus for 2026.[6]

★ FIVE STORIES TO WATCH ★

01 IMPORTS SURGE
July U.S. container imports reach 2.5M TEUs as retailers front-load for the holidays.[1]



Source: Descartes, Aug 10, 2026

02 SHEIN STRATEGY
Shein winds down Vietnam warehouse operation and returns focus to China supply chain.[2]



Source: Reuters, Aug 9, 2026

03 SHEIN IPO PLAN
Shein eyes Hong Kong IPO as early as Aug. 19 at a $30B–$40B valuation.[3]



Source: Reuters, Aug 11, 2026

04 APPAREL COSTS
U.S. PPI for apparel falls in July, signaling some relief on input costs.[4]



Source: BLS, Aug 14, 2026

05 RETAIL EARNINGS
Nike reports Q1 miss and announces leadership transition to drive next phase of growth.[5]



Source: Nike, Aug 14, 2026



★ BOTTOM LINE ★

Holiday inventory builds are in full swing while tariff costs, compliance, and capital efficiency take center stage. Companies that combine sourcing flexibility with strong execution will be best positioned to win in the second half of 2026.

★ BOB'S TAKE ★

The game is no longer about finding the cheapest supplier. It's about building the smartest supply chain—one that can adapt quickly, manage risk, and deliver value all the way to the consumer.



Sources: 1) Descartes Datamyne (Aug 10, 2026) 2) Reuters (Aug 9, 2026) 3) Reuters (Aug 11, 2026) 4) U.S. Bureau of Labor Statistics (Aug 14, 2026) 5) Nike (Aug 14, 2026) 6) Deloitte 2026 Retail Outlook (Aug 2026)

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Owned by the growers we serve. Committed to service and returns.

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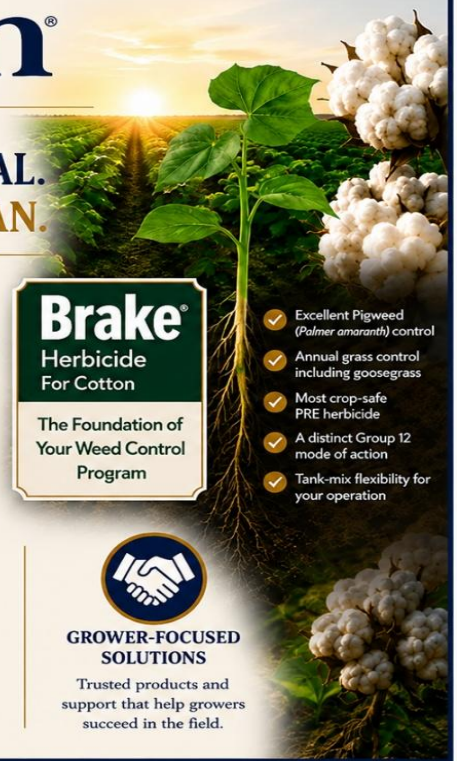
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Broad-spectrum residual control of grasses and broadleaf weeds.

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YIELD PROTECTION
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Trusted products and support that help growers succeed in the field.

HELPING COTTON GROWERS BUILD STRONGER CROPS FROM PLANTING TO HARVEST

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GOWAN COTTON COMPANY

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

Gowan Cotton Company's hybrid cotton program combines Extra Long Staple fiber quality with the yield potential and adaptability growers demand. Gowan 1432 has demonstrated strong performance across California, Arizona, New Mexico, and the Southern Plains while delivering premium ELS fiber characteristics.



ELS FIBER QUALITY
Extra Long Staple fiber quality that meets premium market demands.

UPLAND-TYPE YIELD
Yield potential and agronomic performance that competes with leading upland cotton.

NON-GMO OPTION
Gowan 1432 is available as a non-GMO hybrid ELS cotton.

PROVEN ACROSS THE PIMA BELT
Tested and trusted across California, Arizona, New Mexico, and the Southern Plains.

ADVANCING AMERICAN COTTON THROUGH HYBRID ELS INNOVATION

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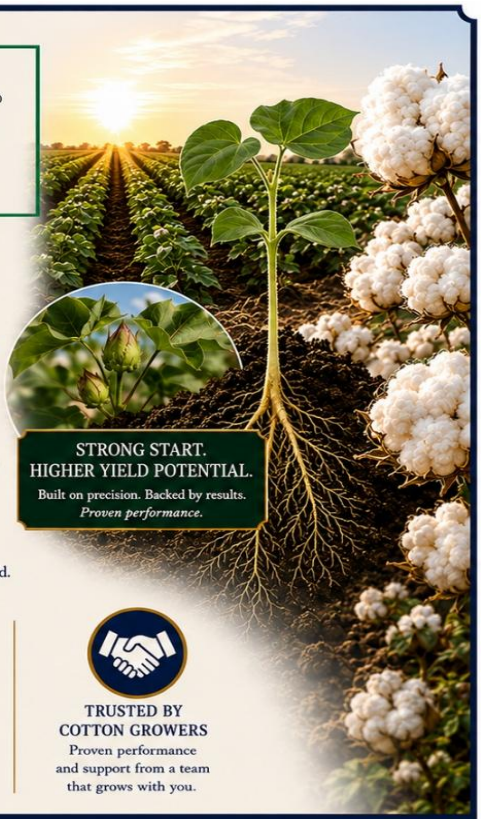
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Trusted by growers across the Cotton Belt, AgLogic remains committed to delivering performance where it matters most—in the field.



EARLY SEASON VIGOR
Stronger plant establishment for better stands and improved growth.

THRIPS & NEMATODE PROTECTION
Broad-spectrum control of key pests that rob yield potential.

YIELD POTENTIAL
Healthier plants deliver more bolls and greater yield potential where it counts.

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HELPING COTTON GROWERS MAXIMIZE PERFORMANCE FROM PLANTING TO HARVEST

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Maple Gin is committed to ginning American Pima cotton with integrity, efficiency, and unmatched quality.



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Committed to delivering premium fiber quality.

GROWER PARTNERED

Building strong relationships and supporting growers every step of the way.

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Modern equipment and experienced teams for peak performance.

INTEGRITY DRIVEN

Operating with honesty, transparency, and a commitment to do what's right.

SUPPORTING AMERICAN PIMA GROWERS AND DELIVERING PREMIUM QUALITY.

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

PREMIUM FIBER QUALITY

Advanced ginning and gentle handling to protect the strength, length and color of Pima cotton.

STATE-OF-THE-ART OPERATIONS

Modern equipment and proven processes ensure consistent, premium results.

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Owned by the growers we serve—working together for a stronger future.

SERVING YOU CAN COUNT ON

Honest, reliable, and committed to building lasting relationships with our members.

DEDICATED TO GROWERS. COMMITTED TO QUALITY. DELIVERING VALUE.

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Your membership helps us deliver timely market intelligence, agronomic insights, production research and industry education that strengthen our growers and our industry.

OUR MISSION

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

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

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- Weekly market intelligence and commodity insights
- Timely agronomic updates and crop progress reports
- Production research and best management practices
- Policy, trade and industry news that impact growers
- Access to research, education and extension resources
- Connections with industry leaders and collaborators
- Strengthening the future of American Pima cotton

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SMALL BUSINESS PARTNER
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annually

For small businesses that support the Pima cotton industry and its future.

INDIVIDUAL PARTNER
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- Recognition on PCIA digital platforms
- Opportunities to share company updates relevant to the American Pima industry
- Visibility among growers, merchants, textile manufacturers, brands, retailers and industry stakeholders

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