THE PIMA FIELD & MARKET JOURNAL PIMA GROWERS

PIMA GROWERS

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

WEEK ENDING AUGUST 28, 2026



COVER STORY

EL NINO WATCH

Harvest Quality Risk Today - Winter Recharge Opportunity for 2027

El Nino has strengthened materially since July. NOAA's August update reports an El Nino Advisory, a latest weekly Nino-3.4 departure of +1.8 C and greater than 90% odds of a very strong event from fall into winter. For the 2026 American Pima crop, the immediate concern is harvest-period rain, humidity and field access. Looking toward 2027, improved winter precipitation, snowpack and reservoir recharge could strengthen the production outlook - but outcomes remain probabilistic and locally variable.

PIMA vs. UPLAND FIBER SPREAD

$0.7959

PER POUND

Pima spot price	$1.71/lb
Upland spot price	$0.9141/lb

Pima premium over Upland

87.1%

American Pima retains a strong premium, although the current spread is $0.0241 below the prior five-year average of $0.8200 per pound.

Source: Trading Economics and PCIA market benchmarks, August 28, 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.

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- Journal Sponsorships
- Feature Articles
- Industry Partner Pages

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THE 2026 CROP MOVES INTO OPEN BOLL

Heat, Water Discipline and Market Position Define the Week

American Pima enters open boll as growers protect final boll maturity, taper irrigation and prepare for harvest.

WEEK ENDING AUGUST 28, 2026



PIMA PERSPECTIVE

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

The 2026 American Pima crop has moved into open boll. Across the five reporting regions, management has shifted from building fruit to finishing the harvestable bolls already established. Arizona fields range from first open boll to roughly 40% open, while California, New Mexico and West Texas are also advancing toward harvest.

Heat and limited rainfall remain the defining production risks. Safford leads the thermal-stress index at 108 points, and all five monitored stations are below normal for year-to-date precipitation. Lubbock carries the largest deficit at 3.83 inches. Average modeled irrigation need is 2.10 inches for the week, with a High planning status and field-by-field tapering now essential.

The market backdrop remains favorable. American Pima spot holds a $0.7959-per-pound premium over Upland. Export commitments reached 168.3K bales, 71.6% ahead of last year, while USDA projects 399,000 bales of production and 101,000 bales of 2026/27 ending stocks. The broader market-environment index remains moderately positive at 65.

The priority is straightforward: preserve available moisture through final boll maturity, scout aphids and stinkbugs through the end of the season, and time harvest aids to crop condition. The premium will be earned by protecting fiber quality as more bolls open—not by extending vegetative growth.

KEY TAKEAWAYS

OPEN BOLL

All five regions are at open boll; eastern Arizona ranges to about 40% open.

WATER DISCIPLINE

Average modeled need: 2.10 in. Planning status: High - taper by field.

MARKET POSITION

Pima/Upland premium: $0.7959/lb. Export commitments: 168.3K bales.

QUALITY WATCH

Heat, aphids, stinkbugs, boll maturity and harvest timing remain key risks.

THIS WEEK ACROSS THE JOURNAL

SIGNAL	CURRENT READING
U.S. Pima Production	399,000 bales
U.S. Pima Yield	1,333 lb/acre
Export Commitments	168.3K; +71.6% YoY
Pima Premium Over Upland	+$0.7959/lb
Irrigation Planning	High; avg. need 2.10 in
Highest Thermal Stress	Safford: 108 points
Largest YTD Rainfall Deficit	Lubbock: -3.83 in

Sources: USDA WASDE and Crop Progress; USDA FAS/Supima Week 3; IEM ASOS/AWOS; NOAA/NCEI; Trading Economics; PCIA market indications; journal dashboards and field reports. Interior-page data through August 28, 2026; journal cover excluded.

American Pima's premium is earned in the final weeks through disciplined water management, late-season scouting, boll maturity and timely harvest.

Finish the bolls already earned—and protect the fiber quality the premium market expects.

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AMERICA'S FINEST COTTON

GLOBAL CLIMATE INTELLIGENCE

EL NIÑO WATCH

Implications for American Pima & Global Extra-Long Staple Cotton

AUGUST 2026 UPDATE - ISSUE 1

El Niño has strengthened materially since the July outlook. NOAA reports an El Niño Advisory, a latest weekly Niño-3.4 departure of +1.8°C, and a May-July Relative Oceanic Niño Index of +1.0°C.

The August outlook assigns greater than 90% odds to a very strong event from September-November through November-January. For American Pima, the immediate issue is harvest quality; the longer opportunity is improved winter recharge for 2027.



Southwest cotton at sunset: harvest risk now, recharge opportunity ahead.

For the 2026 crop, harvest quality is the immediate risk; for 2027, winter recharge is the strategic opportunity.

NOAA emphasizes that stronger El Niño conditions increase confidence in typical impacts but do not guarantee them. Growers should track harvest-period rain and humidity, winter precipitation, snowpack and reservoir response, and the timing of spring field preparation.

KEY WATCH POINTS

- Rain or humidity during boll opening and harvest
- Winter precipitation, snowpack and reservoir recharge
- Soil-moisture recovery before 2027 planting
- Peru coastal flood exposure and logistics
- Xinjiang autumn temperatures and irrigation-water availability

Sources: NOAA CPC ENSO Diagnostic Discussion, 13 Aug 2026; CPC ENSO Update, 17 Aug 2026.

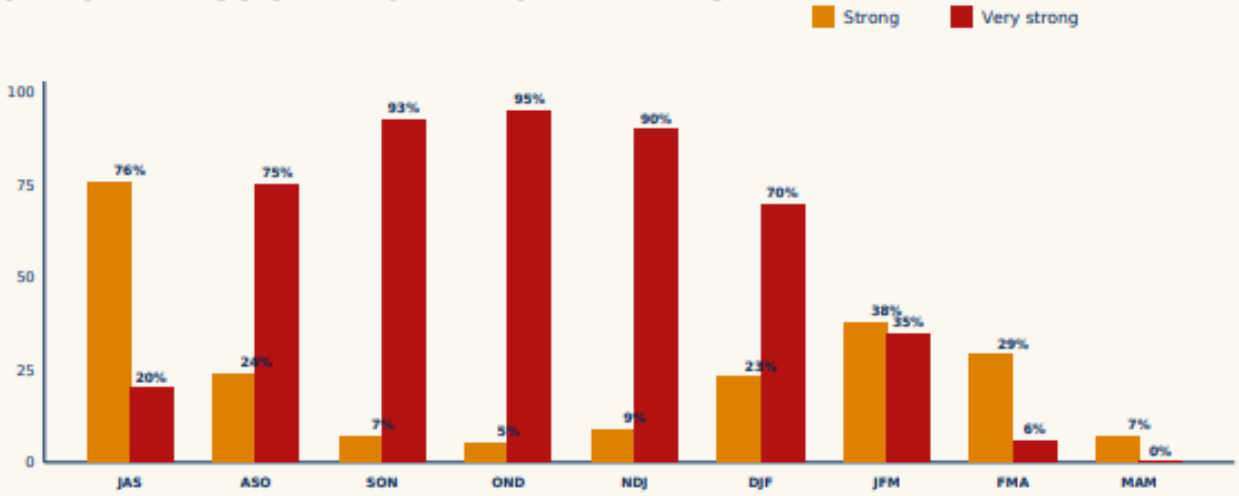
NOAA ENSO OUTLOOK

Official NOAA CPC update - August 2026

ENSO Alert System Status: El Niño Advisory.
El Niño is present and strengthening. NOAA reports above-average equatorial Pacific sea-surface temperatures and atmospheric circulation anomalies consistent with a coupled El Niño event.

CURRENT STATUS	AUGUST 2026
Latest weekly Niño-3.4	+1.8°C
May-July RONI	+1.0°C
Very strong odds, SON-NDJ	>90%
Historic-event odds, OND	69%
Persistence	Through spring 2027

OFFICIAL ENSO STRENGTH PROBABILITIES



WHAT NOAA IS SAYING

- El Niño is strengthening through late 2026.
- Very strong intensity is favored from fall into winter.
- Impacts remain probabilistic, not guaranteed.

PIMA REGION INTERPRETATION

- Harvest-period storms remain the immediate 2026 concern.
- Winter moisture may improve recharge and early 2027 soil profiles.
- Operational planning should retain irrigation flexibility.

Source: NOAA CPC Official ENSO Strength Probabilities, issued 13 Aug 2026; CPC ENSO Update, 17 Aug 2026.

U.S. SEASONAL OUTLOOK & WEATHER PATTERNS

Official NOAA CPC winter outlook maps - issued August 2026

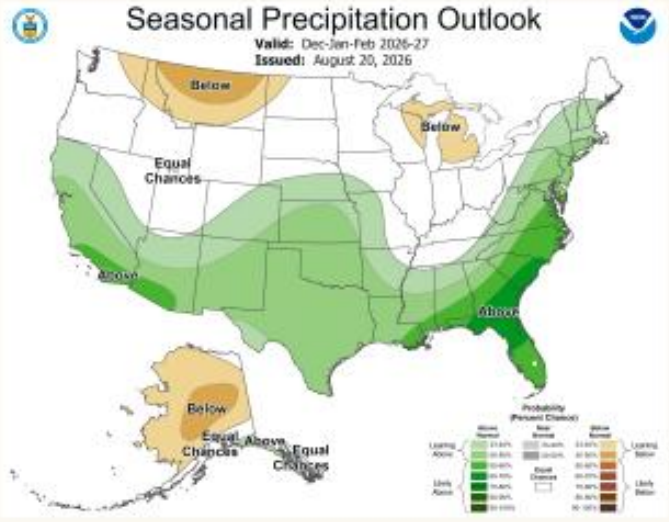
U.S. TEMPERATURE OUTLOOK - DECEMBER 2026 TO FEBRUARY 2027



TEMPERATURE MESSAGE

- Above-normal temperature odds dominate much of the northern and eastern U.S.
- The Southwest is generally near equal chances to modest warm tilts.
- Warm spells can raise evaporative demand where soil moisture is limited.

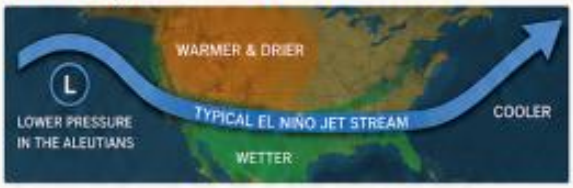
U.S. PRECIPITATION OUTLOOK - DECEMBER 2026 TO FEBRUARY 2027



PRECIPITATION MESSAGE

- Above-normal precipitation odds favor much of the southern tier, including key Southwest areas.
- Drier odds favor parts of the Pacific Northwest and northern Rockies.
- This is an official seasonal forecast, not a guarantee for any farm or basin.

TYPICAL EL NIÑO JET-STREAM PATTERN

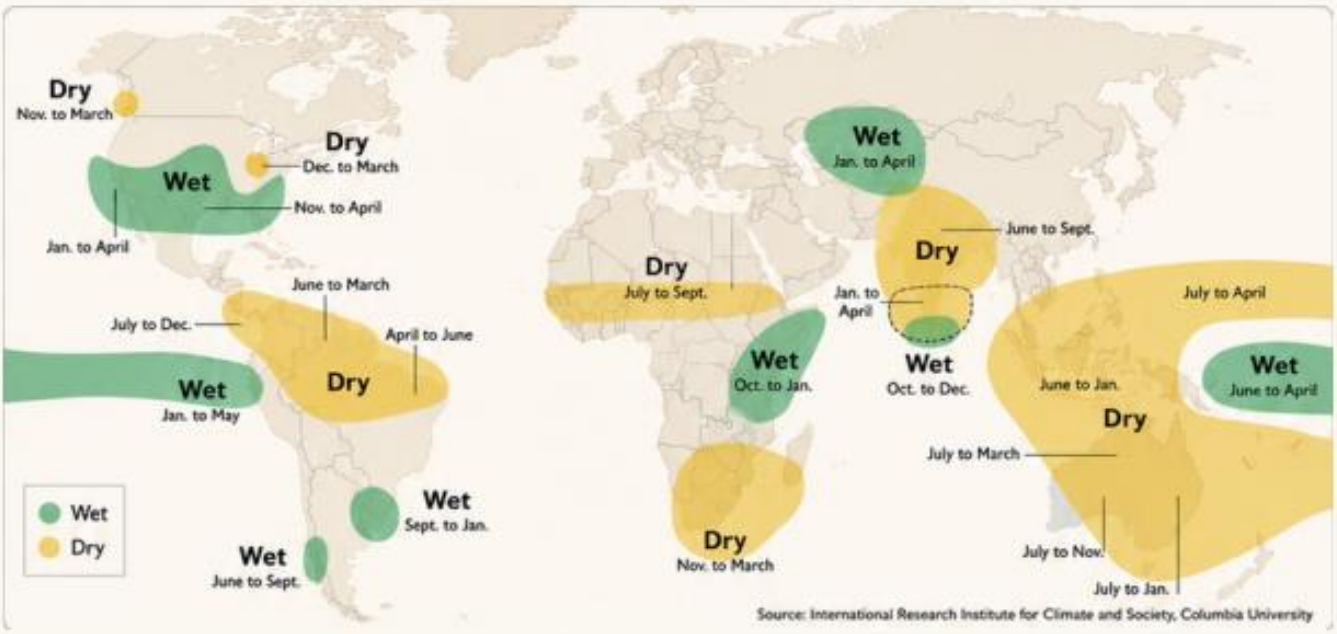


Regional takeaways: California - monitor winter storm access and reservoir response. Arizona and New Mexico - improved moisture odds may support soil recharge. Far-West Texas - wetter southern-tier odds are favorable, but local variability remains high. All regions - protect irrigation optionality and monitor extremes.

Sources: NOAA CPC official DJF 2026-27 seasonal outlook maps, August 2026; NOAA Climate.gov historical El Niño composite.

GLOBAL ELS CLIMATE & SUPPLY INTELLIGENCE

El Niño implications for key extra-long staple cotton regions



The map above is retained exactly from the supplied feature and depicts broad historical El Niño teleconnections. It is not a seasonal forecast. Regional production and quality outcomes depend on local timing, irrigation systems and weather extremes.

REGIONAL CLIMATE INTELLIGENCE

PERU

- Elevated coastal flood exposure.
- Harvest and logistics disruption possible.
- Quality risk rises in flood-affected areas.

HIGH

EGYPT

- Nile irrigation buffers rainfall variability.
- Water allocation remains important.
- Heat during flowering and boll fill to monitor.

LOW-MODERATE

ISRAEL

- Mediterranean rainfall varies.
- Irrigation storage and allocation reduce risk.
- Low freeze exposure supports early development.

LOW

XINJIANG

- Autumn temperature and early frost remain key.
- Mountain snowpack supports seasonal irrigation runoff.
- Water policy remains a production factor.

MODERATE

AMERICAN PIMA

- Improved winter-moisture odds.
- Established irrigation infrastructure.
- Favorable strategic position for 2027.

HIGH

GLOBAL ELS SUPPLY CHAIN OUTLOOK

REGION	PRODUCTION	QUALITY	LOGISTICS	OUTLOOK
Peru	High	High	High	Challenged
Egypt	Low-Mod.	Low-Mod.	Low	Stable
Israel	Low	Low	Low	Stable
Xinjiang	Moderate	Moderate	Low-Mod.	Cautious
American Pima	Low	Low	Low	Favorable

CONCLUSION

What This Means for American Pima



El Niño is strengthening at a time when American Pima growers face two different planning horizons. The 2026 crop is approaching harvest, making rainfall, humidity, wind and field access the immediate quality variables. For 2027, the potential benefit is improved winter moisture, reservoir recharge and soil-profile recovery.

1. WHY EL NIÑO MATTERS

The August NOAA update materially increases confidence in a very strong fall and winter event. Typical El Niño winters tilt precipitation odds toward the southern United States, but local outcomes remain uncertain and must be managed as probabilities.

2. LOOKING TOWARD 2027

Better winter moisture would improve early-season soil profiles and may support reservoir recharge. Growers should monitor basin response, seed quality, irrigation infrastructure and field readiness rather than assume that a strong El Niño guarantees adequate water.

3. STRATEGIC POSITION

American Pima retains an advantage in irrigation infrastructure, experienced growers and reliable premium-fiber production. Maintaining disciplined management and protecting quality through harvest will position the U.S. crop to capture 2027 opportunities.

LOOKING AHEAD

- Next quarterly update: November 2026.
- Monitor weekly ENSO conditions and official seasonal outlooks.
- Track reservoirs, snowpack, field reports and market conditions.
- Neutral conditions are not assumed by spring; persistence remains favored.

SOURCE FRAMEWORK

- NOAA CPC: ENSO diagnostics and outlooks.
- WMO: global climate assessments.
- USDA: drought and market reporting.
- Regional agencies: local forecasts and water conditions.
- Pima Growers: integrated agronomic and market analysis.

BOTTOM LINE

El Niño does not determine success - it shifts the odds. For American Pima, the opportunity is improved winter moisture and a stronger 2027 starting position; the obligation is vigilant harvest-quality management and disciplined irrigation planning.

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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, 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 28, 2026

EXECUTIVE SUMMARY

American Pima's value position remains favorable, although the current premium over Upland narrowed to $0.7959 per pound, slightly below the prior five-year average spread of $0.8200. Reduced acreage and estimated ending stocks of 101,000 bales continue to support the supply side.

Week 3 commitments reached 168.3K bales, 71.6% ahead of last year. Weekly exports rose to a season-best 8.6K bales. Accumulated shipments reached 21.5K, 29% behind last year.

- **Total Commitments:** 168.3K bales, +71.6% YoY
- **Weekly Exports:** 8.6K bales, season best
- **Ending Stocks:** 101,000 bales
- **Current Pima/Upland Spread:** $0.7959/lb

AMERICAN PIMA VALUE POSITION



Discounted Neutral Favorable

+$0.7959/LB

PREMIUM OVER UPLAND

Long-Staple Price Ratio: 187%

Five-Year Average Spread: $0.8200/lb

Outlook: FAVORABLE

FIBER MARKET BENCHMARKS | PCIA INDICATIONS

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	$1.82	Premium
Giza 94 Landed	$1.50	Neutral
Upland Spot	$0.9141	Discount
Polyester Staple Fiber	$0.52/lb	Discount
WTI Crude Oil	$83.44	External Cost Signal

SUPPLY & DEMAND

	2024 CROP	2025 CROP EST.	2026 CROP EST.
Acres	200,500	142,000	148,000
Production (Bales)	471,000	388,000	399,000
Ending Stocks (Bales)	140,000	107,000	101,000

COMMITMENTS	ACREAGE VS 2024	PRODUCTION VS 2024
+71.6% YoY	-26.2%	-15.3%

DEMAND & CURRENT FACTS

Total Commitments	168.3K
Last Year Same Week	98.1K
Net Sales - Week 3	2.1K
Weekly Exports	8.6K
Shipped to Date	21.5K
Outstanding Sales	146.8K

WEEK 3 TRADE DETAIL

NEW SALES BY MARKET

THOUSAND RUNNING BALES

India	1.5
Turkey	0.4
Bangladesh	0.4
Pakistan	0.1
Japan	0.1
Other / Buy-Backs	-0.4
TOTAL	**2.1**

EXPORTS BY MARKET

THOUSAND RUNNING BALES

India	4.3
Bangladesh	1.3
Egypt	1.1
Peru	0.9
Vietnam	0.9
TOTAL	**8.6**

Market figures are rounded and may not sum to the reported total.

Sources: USDA FAS Export Sales Report; Supima Weekly Pima Market Report - Week 3; SunSirs; Trading Economics; PCIA estimates. Data as of August 28, 2026.
Pima and competing ELS values are PCIA market indications. PSF: 7,744.82 CNY/metric ton / 6.7268 CNY per USD / 2,204.62 lb = $0.52/lb.
Ending-stock columns correspond to the 2024/25, 2025/26 and 2026/27 marketing years, respectively.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 3 · Ending August 20, 2026 · MY Aug 2026 – Jul 2027 · Week 3

Week three: exports hit a season-best 8.6k as the book edges to 168.3k — still 72% ahead of last year's pace

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
2.1 k RB	**8.6** k RB	**168.3** k RB	**12.8** %	**146.8** k RB
▼ 3.8 incl. 0.4k buy-backs	▲ 1.8 vs 6.9	▲ 71.6% YoY LY 98.1	21.5 of 168.3 · LY 31.1%	▼ 6.6 needs ~3.0k/wk over 49 wks

THIS WEEK IN THE MARKET

Demand took a quiet week; the lead did not. Net sales of 2.1k RB came mostly from India (1.5k), with Turkey (0.4k) and Bangladesh (0.4k) filling in. After three weeks the book stands at 168.3k versus 98.1k a year ago — a 71.6% advantage that a slow sales week barely dented.

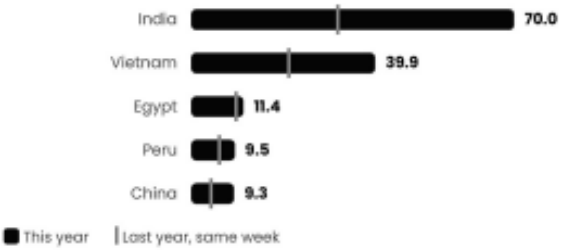
Shipments posted their best week of the young season. Exports of 8.6k RB were the real story, and they spread wide: India (4.3k), Bangladesh (1.3k), Egypt (1.1k), Peru (0.9k) and Vietnam (0.9k) all took delivery. Accumulated exports reached 21.5k — still 29% behind last year's unusually fast start, but the gap is a timing artifact of a book 72% larger.

India's anchor position keeps compounding. At 70.0k committed, India holds 41.6% of the book and sits at 2.2× its year-ago position. Vietnam (39.9k), Egypt (11.4k), Peru (9.5k) and China (9.3k) round out a top five that is ahead of last year across the board.

- Three weeks in: 168.3k committed, +71.6% YoY — a slow demand week changed nothing about the trajectory.
- Season-best exports of 8.6k across five markets — shipping is accelerating into the new book.
- The order book (146.8k) needs ~3.0k/wk to clear; the recent pace is 7.8k — 2.6× coverage.

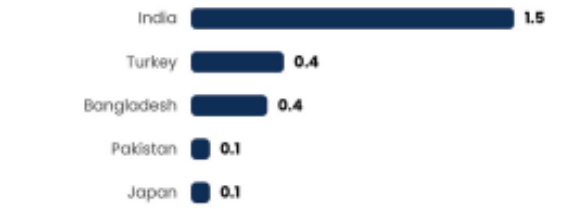
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



WEEK 3 NEW SALES BY MARKET

k RB, net new business



SEASON SHIPMENT PROGRESS

% of commitments shipped



Season outlook: 49 weeks remain. Outstanding sales of 146.8k RB need ~3.0k/wk; the last two weeks averaged 7.8k. Accumulated exports (21.5k) trail last year's fast start by 29% — a gap that should close as the season's larger book converts to shipments.

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 22

The Supima index holds at **$213M trailing twelve months**. Nordstrom's number dipped to **$1.16M (–31.5%)** on an assortment turnover, not a demand break: the fall line relaunched mid-August, and the brand-new LS V-neck did **$548K on 12.2k units in its first full week** — nearly half the line. Original Favorites ran **+37% to $99K**, its best week since the July restock, all at full price.

Market Index

SUPIMA-TAGGED · 81 BRANDS

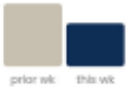


$213M TTM

1,263 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® · 59 SKUS



$1.16M

▼ 31.5% WoW

23,518 units

Fall relaunch week: the catalog turned over to 59 active SKUs and the new LS V-neck opened at $548K — watch it compound.

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 $99K week is its strongest since raising prices — back-to-school demand at full freight.

Sources & method: USDA FAS Export Sales Reporting, CWR, American Pima raw cotton, wk 3 ending 08/20/2026 (MY 26/27) · Particl retail estimates (modeled): market index = Supima-tagged; brand cards = Supima-titled, windows Aug 16–22 vs Aug 9–15. 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 28, 2026

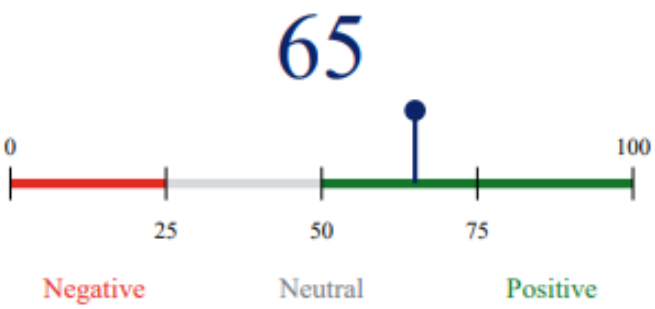
Executive Summary

Outside-market conditions remain moderately positive for American Pima. Stronger cotton values and lower energy costs offset a firmer U.S. dollar and a slight increase in ocean freight. The dollar closed at 99.67, ICE Cotton No. 2 finished at 91.41 cents per pound and the Freightos Baltic Index moved to $3,590.

Energy and financing pressure eased modestly. WTI crude closed at $83.44 per barrel and the 10-year Treasury yield finished at 4.72%. China's latest available official manufacturing PMI remained at 49.2, keeping China demand the principal risk to textile consumption.

The PMEI held at 65. The 30-90 day balance remains moderately positive, supported by cotton values and lower energy costs, but constrained by the stronger dollar, firm freight and weak Asian manufacturing demand.

Pima Market Environment Index



MODERATELY POSITIVE

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

Primary Risk: China Demand

GLOBAL MARKET SNAPSHOT

INDICATOR	CURRENT	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	$83.44	Falling	Positive
U.S. Dollar Index (DXY)	99.67	Rising	Headwind
ICE Cotton No. 2	91.41¢	Firm	Positive
Polyester Staple Fiber	$0.51/lb	Neutral	Neutral
Ocean Freight (FBX)	$3,590.00	Firming	Headwind
U.S. 10-Year Treasury	4.72%	Easing	Positive
China Manufacturing PMI	49.2	Contracting	Primary Headwind

Competitive Position: Moderately Positive

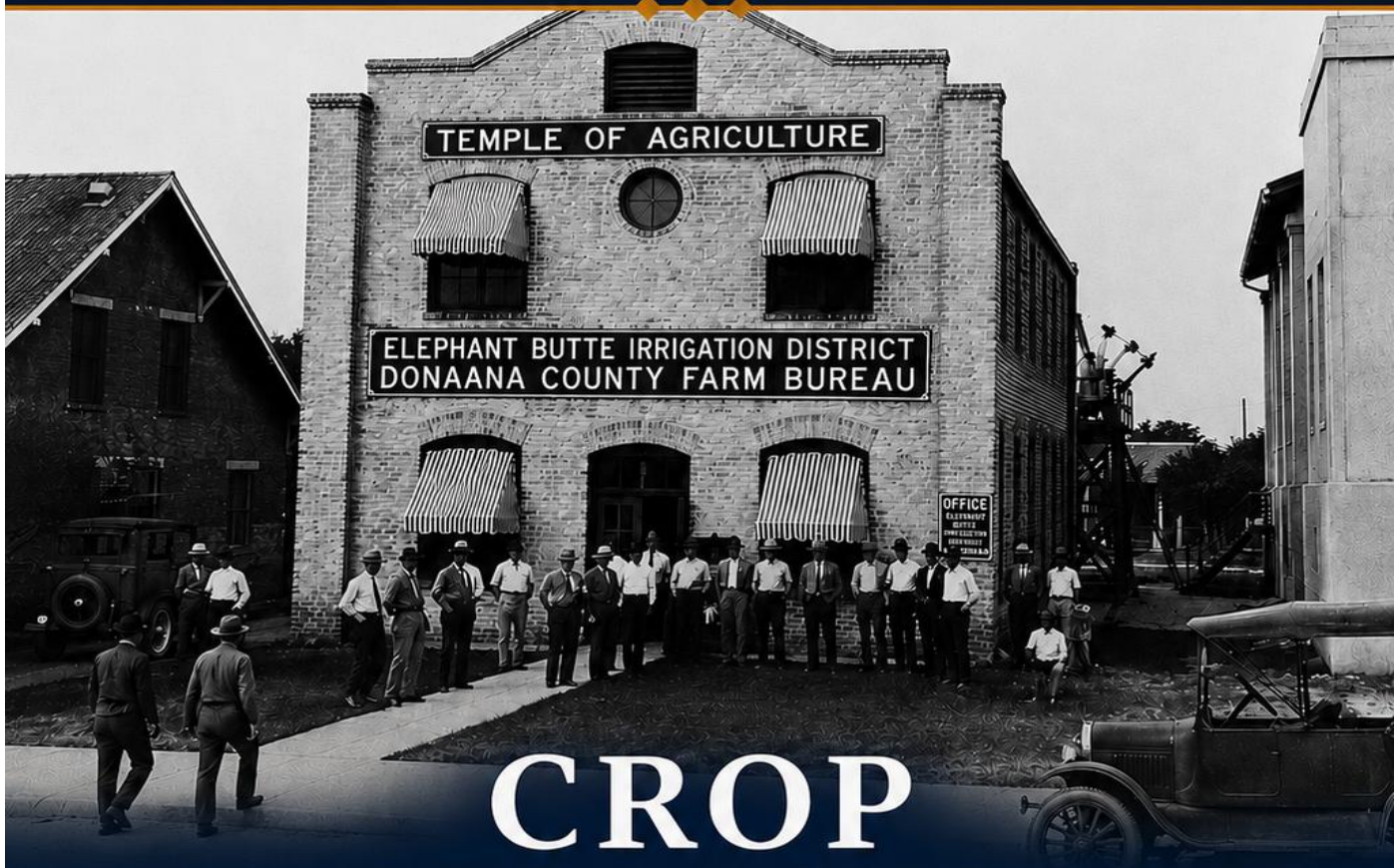
PMEI is a comparative market-environment index; it is not a price forecast or stand-alone demand model.

Sources: Trading Economics; Freightos Baltic Index; SunSirs; China NBS.
Overnight-finalized data for August 28, 2026. China PMI is the latest official release available at close.

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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

American Pima Production Update

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

REPORT DATE 8-24-26
WEEK ENDING 8-28-26

Executive Field & National Crop Summary

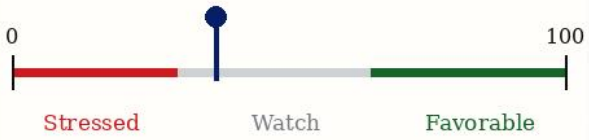
U.S. cotton conditions declined for the third straight week. The 15-state crop fell to 37% Good to Excellent, down from 38% last week and 54% one year ago. California held at 95% G+E, Arizona improved 16 points to 85%, and Texas slipped two points to 19%.

Development remains near seasonal pace: 81% of the crop is setting bolls versus the 84% five-year average, while 20% has open bolls, matching the average. Arizona remains the most advanced Pima state at 71% open; California is 5% open and Texas 20%.

Weather kept the supply side firmly in focus. All Oklahoma cotton acres are now in some level of drought, along with 78% in Kansas and 59% in Texas. Spotty West Texas showers provided limited relief, while the forecast remains hot and dry.

U.S. UPLAND CONDITION

37% G+E



LOWEST OF 2026

Third consecutive weekly decline

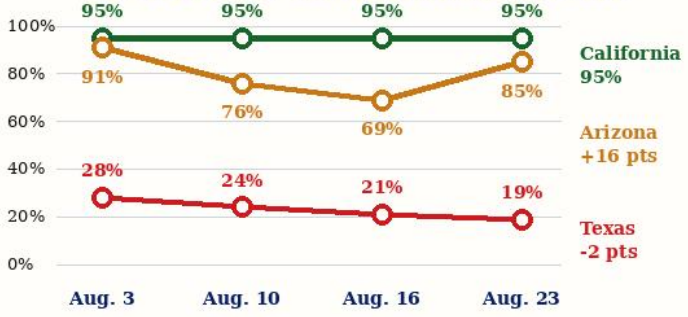
Year Ago: 54%

USDA PIMA-BELT PROGRESS SCORECARD

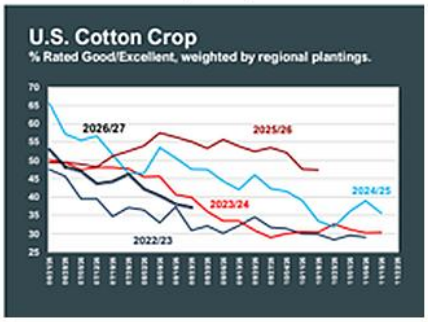
STATE	SETTING BOLLS 2026 / AVG.	BOLLS OPEN 2026 / AVG.	GOOD + EXCELLENT	WEEKLY TREND
CALIFORNIA	90 / 89	5 / 3	95%	UNCHANGED
ARIZONA	97 / 99	71 / 56	85%	UP 16 PTS
TEXAS	73 / 79	20 / 23	19%	DOWN 2 PTS
NEW MEXICO	N/A	N/A	N/A	NOT REPORTED

2026 / AVG. compares Aug. 23, 2026 with the 2021-2025 average.
New Mexico is not separately reported by USDA NASS.

PIMA-BELT CONDITION TREND



MULTI-YEAR CONTEXT



CALIFORNIA - LEADING:
95% G+E; boll set reaches 90%.

ARIZONA - REBOUND:
Condition rises to 85%; 71% open.

TEXAS - PRIMARY RISK:
Only 19% G+E; drought covers 59%.

Sources: USDA NASS Crop Progress, Aug. 24, 2026; Pima Growers field intelligence; U.S. Drought Monitor.

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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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 28, 2026

Executive Summary

Heat stress intensified across the American Pima belt during the week. Safford remains the highest-exposure location with 108 total stress points, followed by El Paso at 90, Deming at 82, and Fresno and Lubbock at 73 each.

Daytime heat remains the principal driver. Safford recorded 16 qualifying warm nights and El Paso 11; Lubbock recorded two, Fresno one and Deming none. Every station added at least five total points during the seven-day period.

Interpret the index with crop stage, irrigation status, soil moisture, humidity, canopy temperature, wind, fruit load and the duration of consecutive heat events. Deming includes five qualifying days reconstructed from underlying IEM ASOS observations where daily maximum summaries were unavailable.

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	92	16	16	108	◆ High
Fresno, CA	72	1	1	73	◆ High
El Paso, TX	79	11	11	90	◆ High
Lubbock, TX	71	2	2	73	◆ High
Deming, NM	82	0	0	82	◆ 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 28, 2026

Executive Irrigation Summary

All five regions are now at open boll. Stage-adjusted daily crop ET is 0.30 in/day, but root-zone moisture remains important for finishing mature harvestable bolls and protecting fiber quality.

The monitored stations were essentially dry. Effective rainfall was 0.00 inches at Deming, Fresno, El Paso and Safford and 0.01 at Lubbock. Modeled weekly irrigation need is therefore 2.10 inches at four locations and 2.09 at Lubbock.

Final-irrigation decisions should be based on boll-opening percentage, maturity of the last harvestable bolls, measured root-zone water, forecast conditions and NAWF below 4—not the calendar alone. Taper irrigation to crop demand and avoid late vegetative regrowth.

WEEKLY IRRIGATION PLANNING STATUS

HIGH



Low Moderate High Very High

Average Weekly Irrigation Need: 2.10 in

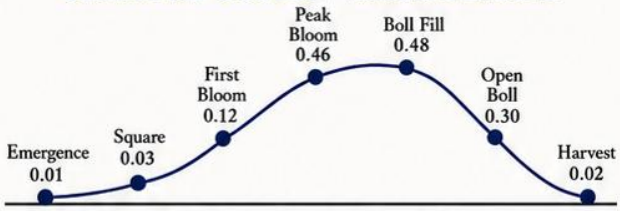
Planning Status: High - Taper by field

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)	Modeled Remaining Seasonal Water† (in)
Deming, NM	Open Boll — 1,957	+125	0.30	0.00	Field Check	2.10	3.6
Fresno, CA	Open Boll — 2,103	+136	0.30	0.00	Field Check	2.10	2.7
El Paso, TX	Open Boll — 1,866	+145	0.30	0.00	Field Check	2.10	1.5
Safford, AZ	Open Boll — 1,835	+156	0.30	0.00	Field Check	2.10	1.0
Lubbock, TX	Open Boll — 1,524	+134	0.30	0.01	Field Check	2.09	1.2

*Cumulative DD60 carries forward from the published August 21 baseline; the weekly gain uses a 60°F base and 86°F upper threshold. Open-boll ETc is 0.30 in/day and effective rain is 85% of observed rainfall. Remaining seasonal water is a modeled planning estimate, not measured soil-water depletion or an automatic irrigation recommendation; confirm root-zone moisture in each field.

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 28, 2026

Executive Weather Summary

Heat intensified across the American Pima belt. Safford reached 110°F, while El Paso reached 106°F and Lubbock 107°F. El Paso recorded the warmest night at 80°F. The five monitored stations were essentially dry; only Lubbock measured 0.01 inch.

After applying NCEI 1991-2020 daily precipitation normals, all five stations are now below normal for 2026. Lubbock has the largest deficit at 3.83 inches, followed by Fresno at 3.18 inches. El Paso moved from a slight surplus to near normal at 0.03 inch below normal.

Management focus: confirm root-zone moisture by field, taper irrigation to open-boll demand, and protect the last mature harvestable bolls without stimulating late vegetative regrowth.

REGIONAL WEATHER RISK

Lower | Elevated | **High** | Extreme

Primary Risk: Heat + Moisture Deficit

Largest YTD Deficit: Lubbock -3.83 in

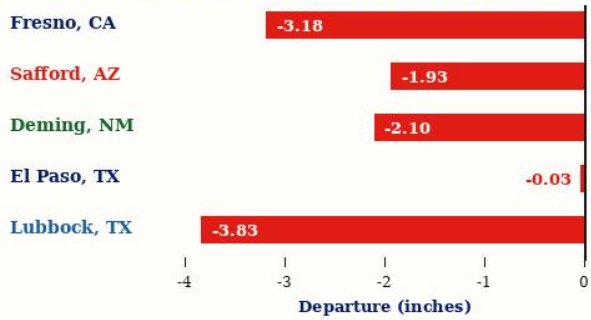
Station Status: All Five Below Normal

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	88-104 / 71-75	0.00 / 0.00	4.54 / -3.18	+136	Open Boll	2.10
Safford, AZ	105-110 / 75-82	0.00 / 0.00	2.97 / -1.93	+156	Open Boll	2.10
Deming, NM	97-105 / 64-75	0.00 / 0.00	3.97 / -2.10	+125	Open Boll	2.10
El Paso, TX	97-106 / 72-80	0.00 / 0.00	5.43 / -0.03	+145	Open Boll	2.10
Lubbock, TX	93-107 / 68-79	0.01 / 0.01	8.66 / -3.83	+134	Open Boll	2.09

Temperature and rainfall use IEM ASOS/AWOS summaries. YTD totals and departures carry forward from the published August 21 baseline, updated with August 22-28 observations and NCEI 1991-2020 daily normals. Effective rain is 85% of observed rainfall. Modified DD60 uses a 60°F base and 86°F upper threshold. All locations use open-boll ETc of 0.30 in/day.

YTD PRECIPITATION DEPARTURE



DROUGHT & CLIMATE OUTLOOK

Latest U.S. Drought Monitor: released August 27 with conditions valid August 25. Monsoonal convection brought relief to much of Arizona and western New Mexico, while persistent heat and dryness continued across the Southern Plains.

Regional interpretation: Fresno remains 3.18 inches below normal. Safford and Deming remain below normal despite broader monsoonal relief. El Paso is near normal, and Lubbock carries the largest station deficit at 3.83 inches.

ENSO update: NOAA's August 13 discussion says El Nino is strengthening, with greater than 90% odds of a very strong event during fall and winter 2026-27. This is seasonal context, not a weekly irrigation signal.

CALIFORNIA - HOT & DRY

Fresno reached 104°F and remains 3.18 inches below normal YTD.

SOUTHWEST - LIMITED RAIN

Safford reached 110°F; Deming and El Paso recorded no measurable rain.

WEST TEXAS - PRIMARY DEFICIT

Lubbock is 3.83 inches below normal; weekly rainfall totaled 0.01 inch.

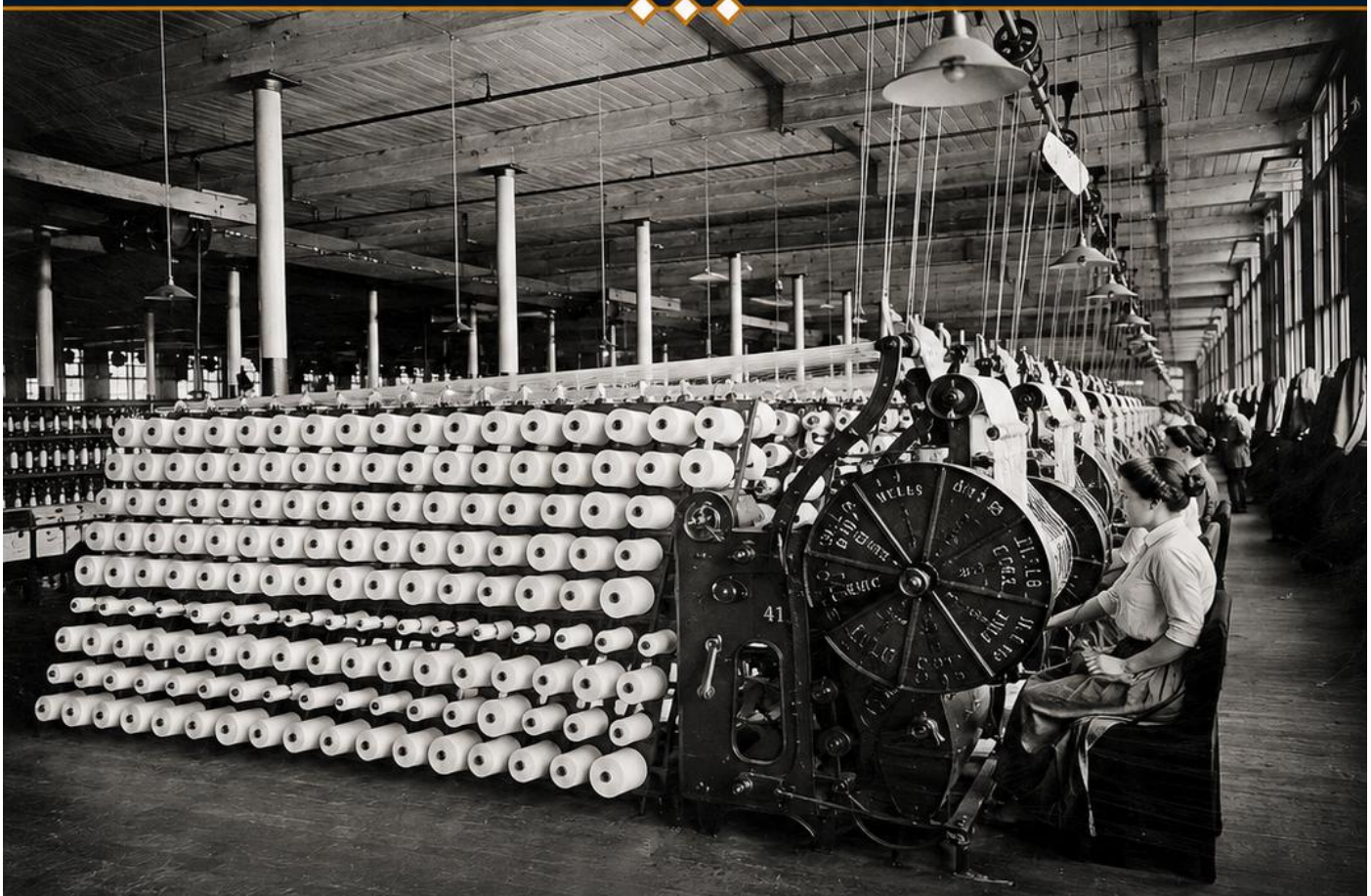
Weather and precipitation: Iowa Environmental Mesonet ASOS/AWOS daily summaries - KSAD, KFAT, KELP, KLBB and KDMN. Normals: NCEI 1991-2020. Drought: U.S. Drought Monitor, valid Aug. 25.

Methods: modified DD60 with 86°F upper threshold; effective rain at 85%; open-boll ETc at 0.30 in/day. Data through August 28, 2026.

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ARIZONA UPDATE

WEEK ENDING 8-28-26









ARIZONA FIELD SUMMARY

EASTERN ARIZONA | AUGUST 28, 2026

It has been a challenging year for the eastern Arizona Pima crop. Above-average temperatures, disappointing monsoon rainfall and limited irrigation capacity have made it difficult to keep pace with crop-water demand.

The crop currently ranges from first open boll to approximately 40% open, with water-stressed fields advancing more rapidly toward maturity.

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 28, 2026



CURRENT CROP & PEST SITUATION

Update by Kerry Siders, Ph.D. - Texas A&M AgriLife Extension | August 28, 2026

WEATHER, RAIN & IRRIGATION

Most everyone is looking forward to more moderate temperatures and the possibility of rain. It is never too late for rain, although some crops may not benefit this year. Moisture could still help finish cotton, peanuts, corn and milo, generate pasture growth before winter and support wheat now being planted north of the area.

Continuing irrigation through the heat has been best for the crop. Meaningful rainfall could help producers decide when field conditions support irrigation termination.

PEST STATUS

Cotton is safe from most insect pests, but cotton aphids and stinkbugs can linger until the end of the season. Most of the moths now visible are garden webworms.

Aphids are present in some areas and a few fields. Occasional adult stinkbugs and consistent egg clusters are still being found, making continued scouting important.

MATURITY & HARVEST AIDS

Cracked bolls are visible in many early-May-planted fields, putting harvest-aid timing just around the corner for some producers.

BOLL AGE & MOISTURE

A boll about 20 days old can tolerate moderate stress - daytime wilting followed by full recovery after sundown or before the next morning.

If the last harvestable boll was set around August 14, it will be approximately 20 days old by September 4. Once a boll is 45 days old, permanent wilt should have little to no effect on its quantity or quality.

Siders recommends maintaining available moisture through approximately September 23. Crop-water use remains near 0.2 inch per day for a few more days, then should decline over the next 3-4 weeks.

Harvest-aid videos:

youtube.com/watch?v=Fb0f7ZzPoI4

youtube.com/watch?v=eMZPaHYzybw

LATE-SEASON MANAGEMENT WATCH

RAIN OPPORTUNITY

Rain can still help finish irrigated cotton and may provide a natural decision point for irrigation termination.

SCOUT TO THE END

Continue checking for cotton aphids, stinkbug adults and egg clusters even as most other insect risk declines.

HARVEST APPROACHING

Cracked bolls in early-May cotton mean harvest-aid preparation is becoming timely for some fields.

MOISTURE TARGET

Keep moisture available through approximately September 23, adjusting for field moisture, boll age and weather.

PIMA GROWERS INTERPRETATION

The West Texas crop is entering the final management phase. Most insect risk has passed, but aphids and stinkbugs still justify scouting. Irrigation decisions should now follow boll age, measured field moisture and forecast rainfall rather than a fixed calendar date.

The priority is to protect the last harvestable bolls through approximately September 23 while preparing timely harvest-aid applications as more early-May cotton begins to open.

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THE PIMA FIELD AND MARKET JOURNAL

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

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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.

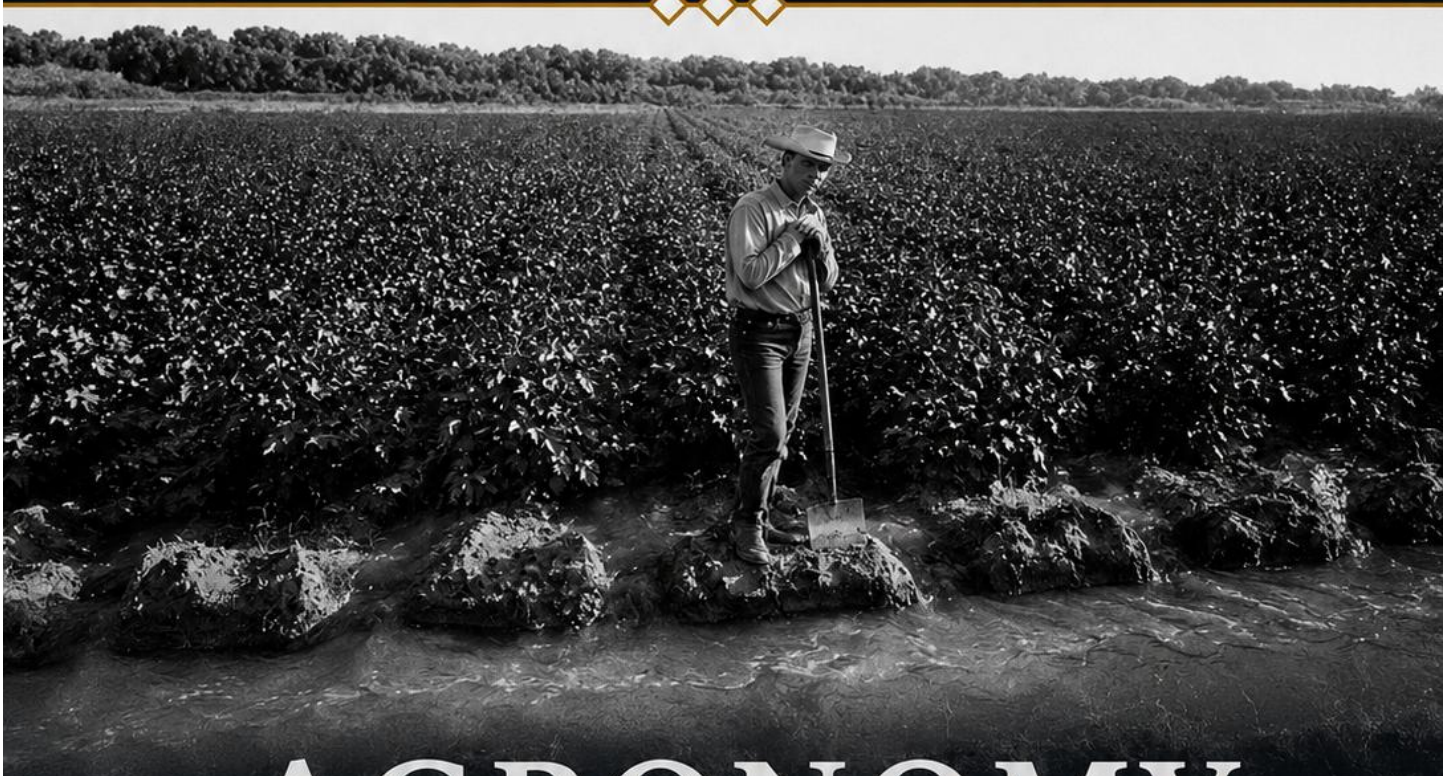
Built on stewardship, science and continuous improvement for people and the planet.

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NUTRITION STRATEGIES

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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

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SOLUTIONS THAT HELP GROWERS SUCCEED.

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TRANSPARENT. TRACEABLE. AMERICAN GROWN.

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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.

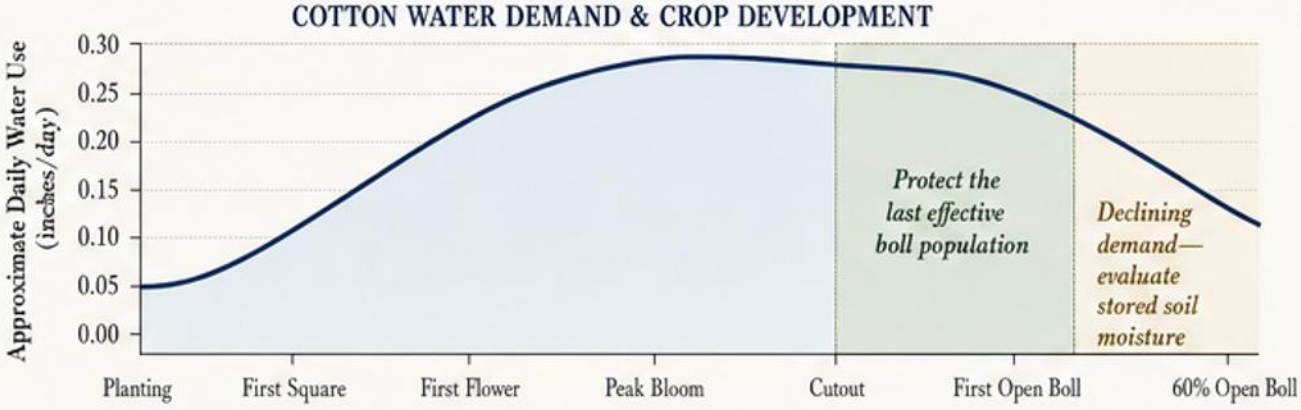
Evaporative demand typically peaks around bloom and early boll filling. As the crop approaches cutout and first open boll, demand naturally declines—but the crop still requires water to complete fiber elongation and maturation of the bolls that will ultimately be harvested.

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.

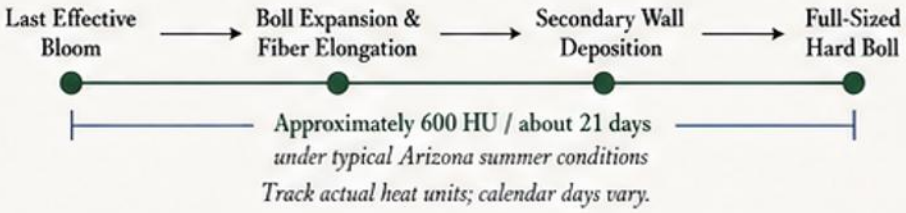
As first open boll progresses toward 60 percent open, evaluate soil moisture and forecast. Taper irrigation to meet demand, not to maintain lush growth. The objective is to finish the bolls, not the plant.

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 EFFECT: LEAF CURLING, STUNTING AND HONEYDEW



COLONIES FEED BENEATH THE LEAF

COTTON APHID MANAGEMENT

Protecting Yield, Leaf Function and Pima Fiber Quality

Pima Growers Journal Agronomy Series | 8-28-26

Cotton aphids remove plant sap, curl and stunt terminals, reduce photosynthetic capacity and excrete honeydew. Before boll opening, sustained populations can reduce growth and yield. After bolls crack, even lower populations can contaminate exposed lint and create costly sticky cotton problems during harvest and textile processing.

HOW APHIDS AFFECT COTTON

Colonies concentrate on leaf undersides and terminals. Heavy feeding diverts carbohydrates from developing bolls, causes leaf curling and premature decline, and can slow boll filling. Honeydew supports sooty mold and, once lint is exposed, can impair harvesting, classing and mill performance.

SCOUT THE TREND - AND THE BENEFICIALS

Sample at least 60 fifth-node leaves across the field. Record aphids per leaf, trend, honeydew, open bolls and natural enemies. Predators, parasitoids and fungal disease can collapse colonies quickly.

PRESERVE THE BIOLOGICAL BRAKES

Broad-spectrum insecticides used for other pests can remove predators and flare aphids. Delay treatment when populations are stable or declining and natural enemies are increasing. Choose the most selective effective option and avoid unnecessary repeat applications.

APPLICATION STEWARDSHIP

Coverage beneath leaves is critical. Follow labeled rates, water volume and pollinator restrictions. Rotate IRAC groups and avoid repeated foliar Group 4A exposure when alternatives fit.

TEXAS A&M ACTION THRESHOLDS

Before first cracked boll: treat when the field average reaches 40-70 aphids per leaf and populations are persisting or increasing. Use the lower end for high-yield potential or stressed cotton.
After first cracked boll: treat at approximately 10 aphids per leaf when honeydew threatens exposed lint, especially if rain is not likely. Confirm field trend, beneficial activity, crop maturity and remaining yield or quality risk before spraying.

CHEMICAL CONTROL OPTIONS

VERIFY CURRENT COTTON LABEL AND TEXAS REGISTRATION BEFORE USE

ACTIVE INGREDIENT (EXAMPLE)	IRAC	MANAGEMENT FIT
Flonicamid (Carbine)	29	Selective feeding blocker; useful where conserving beneficials is a priority.
Sulfoxaflor (Transform WG)	4C	Rapid aphid activity; observe pollinator and bloom restrictions on the label.
Afidopyropen (Sefina)	9D	Selective aphid feeding disruption; useful resistance-management alternative.
Acetamiprid (Intruder Maxx)	4A	Systemic/translaminar option; resistance is documented in some aphid populations.
Imidacloprid or thiamethoxam	4A	May suppress aphids; avoid repeated Group 4A exposure and confirm local efficacy.

Product examples are not endorsements. Labels, state registrations, rates, PHIs and use restrictions change; the pesticide label is the law.

EXTENSION SOURCES: Texas A&M AgriLife Extension, Managing Cotton Insects in Texas and Cotton Aphid; Cotton Incorporated cotton aphid resources; National Cotton Council Beltwide research. 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.

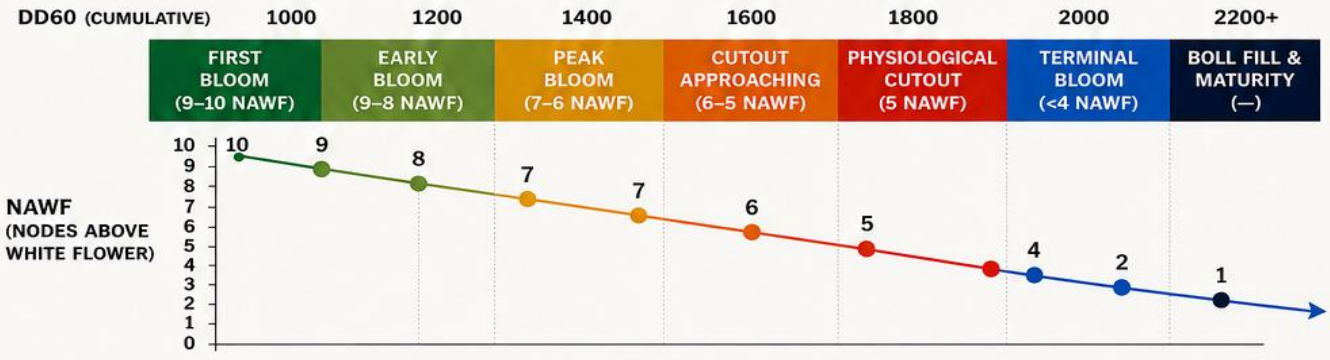
> **"DD60 measures the season. NAWF measures the crop."**

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

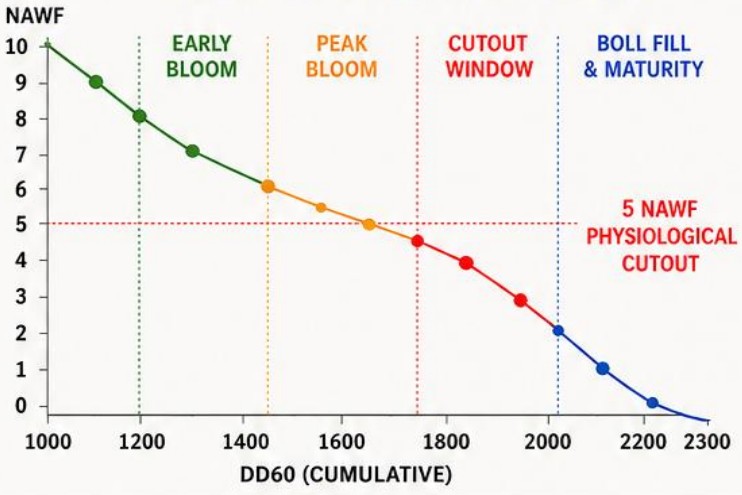


DD60 / NAWF BENCHMARK GUIDE

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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VOL. CLXXIX — NO. 198 FRIDAY, AUGUST 28, 2026 THREE CENTS

CONSUMERS TURN CAUTIOUS

University of Michigan August 2026 survey shows sentiment slipping as inflation worries persist.

ANN ARBOR, Mich. — Consumer sentiment slipped in August, according to the final results from the University of Michigan Surveys of Consumers. The Index of Consumer Sentiment fell to 51.7 in August 2026, down from 55.2 in July 2026 and 58.2 in August 2025.

The decline reflected worsening views of both current economic conditions and the outlook. The Current Economic Conditions Index fell to 51.9 in August, down from 54.8 in July. The Index of Consumer Expectations fell to 51.5, down from 55.4.

On prices, consumers remain concerned that inflation will stay elevated. Year-ahead inflation expectations eased to 4.0 percent in August from 4.2 percent in July, while long-run inflation expectations held steady at 3.3 percent.

Overall, sentiment fell about 6 percent from last month and about 11 percent from a year ago. Expectations for business conditions weakened, and more consumers anticipate slower growth ahead.

"Consumers remain cautious as persistent inflation concerns and a less upbeat economic outlook continue to weigh on confidence," the Survey's chief economist noted.





Sentiment Index	51.7
Current Conditions	51.9
Expectations	51.5
1-Year Inflation View	4.0%
Long-Run Inflation View	3.3%
M/M Change	-6.3%
Y/Y Change	-11.2%



What It Means

- Households remain uneasy about prices
- Spending may stay selective
- Discretionary categories face pressure

The University of Michigan Surveys of Consumers have been measuring how consumers feel about the economy and their finances since 1946. The survey is conducted throughout the month via telephone interviews and includes approximately 500 households.



Source: University of Michigan Surveys of Consumers, Final August 2026 Results.

Mid-Week Market Brief

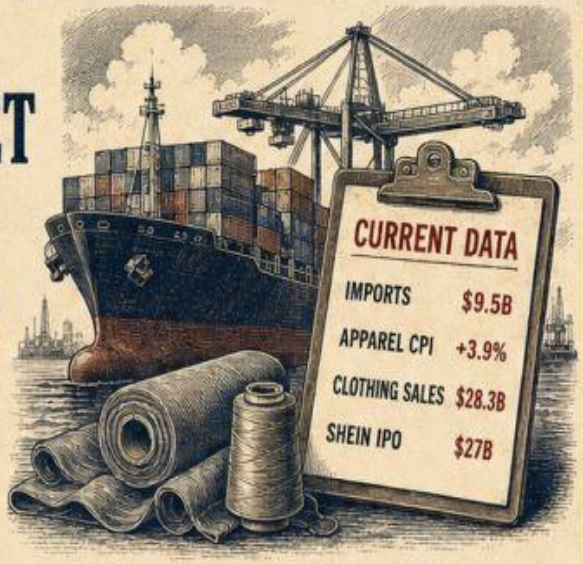
★ NEWS AND INSIGHT FOR THE TEXTILES & APPAREL TRADE ★

WEDNESDAY, AUGUST 26, 2026 VOL. I • NO. 14

★ LEAD STORY ★

APPAREL MARKET SPLITS AS IMPORTS BUILD

The data are sending two messages at once. Apparel imports are building into the holiday season, while July retail sales show shoppers remain selective. Clothing store sales improved even as total retail slipped, and the latest company results split sharply between winners, value players and exposed middle-market retailers.



THE WEEK'S READ

Imports build for holiday.

★

Apparel CPI still runs hot.

★

Clothing sales beat total retail.

★

Abercrombie and Ross raise outlooks.

★

Kohl's and Dick's show pressure.

$9.5B	+8.6%	+3.9%	$28.3B	+1.9%	$27B
JULY IMPORTS	IMPORT GROWTH	APPAREL CPI	CLOTHING SALES	SALES M/M	SHEIN IPO
Apparel imports, highest July since 2022.	July apparel imports versus year earlier.	July apparel prices versus last year.	July clothing and accessories stores.	Clothing-store sales versus June.	Upper valuation in Hong Kong listing.

★ FIVE STORIES TO WATCH ★

01 TRADE

July apparel imports reached $9.5B, up 8.6% from a year earlier, as buyers built inventory into tariff and holiday risk.



Source: OTEXA, Aug. 26, 2026

02 INFLATION

Apparel CPI rose 3.9% year over year and 0.1% from June. The pressure is not gone, even with headline CPI at 3.4%.



Source: BLS, Aug. 26, 2026

03 RETAIL SALES

Total retail sales fell 0.6% in July, but clothing and accessories stores rose 1.9% to $28.3B.



Source: U.S. Census, Aug. 26, 2026

04 COMPANY SPLIT

Abercrombie and Ross raised forecasts. Kohl's sales fell, and Dick's cut guidance as sneaker demand weakened.



Source: Reuters, Aug. 26, 2026

05 SHEIN

Shein's Hong Kong IPO values the fast-fashion giant near $27B, far below its 2022 peak valuation.



Source: Reuters, Aug. 26, 2026

★ BOTTOM LINE ★



The story is not one consumer or one channel. Imports are building, apparel prices are still running ahead of the broader CPI, and July retail sales show shoppers buying selectively. The winners have product heat, value discipline and sourcing flexibility.

★ BOB'S TAKE ★

This is what a mixed market looks like. Good product can still move, and value still works, but tariff cost, inventory risk and compliance are now part of the selling equation. Sourcing has become a margin strategy.



★ Sources: OTEXA • BLS • U.S. Census/FRED • Reuters • Data through Aug. 26, 2026 ★

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For nearly a century, Calcot has served as a grower-owned cotton marketing cooperative connecting American cotton producers to textile mills around the world. Through marketing expertise, warehousing, logistics, risk management, and grower service, Calcot helps growers maximize the value of every bale while minimizing exposure to volatility, integrity and service. Over 90 years of experience and more than 70 million bales marketed worldwide have made Calcot one of the most respected names in cotton.



GLOBAL MARKET ACCESS
Connecting American cotton to textile mills in 50+ countries.

WAREHOUSING & LOGISTICS
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RISK MANAGEMENT
Marketing tools and expertise to help manage price risk and volatility.

GROWER-OWNED COOPERATIVE
Owned by the growers we serve. Committed to service and returns.

CONNECTING AMERICAN COTTON TO THE WORLD'S TEXTILE MILLS

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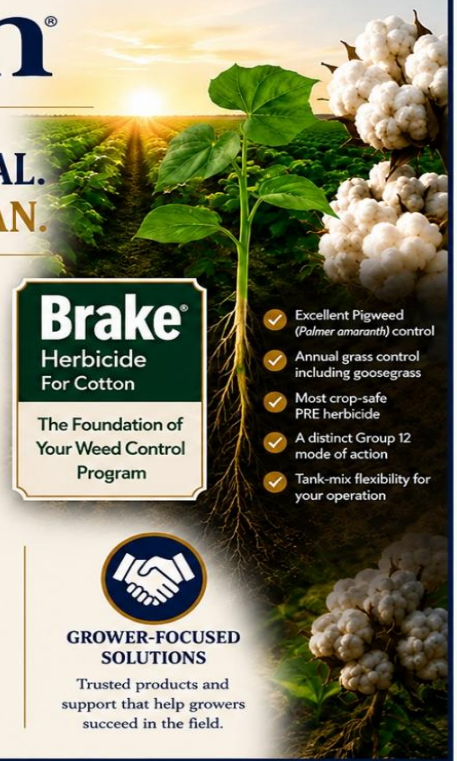
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AMERICA'S FINEST COTTON

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PROTECT YIELD POTENTIAL. START CLEAN. STAY CLEAN.

Gowan delivers innovative crop protection solutions that help cotton growers maximize yield potential and profitability. From early-season weed control to season-long management programs, Gowan products provide the foundation for successful cotton production across the Cotton Belt. Our **Brake®** Herbicide program exemplifies a modern approach to resistance management, residual control, and long-term stewardship.



SEASON-LONG WEED CONTROL
Broad-spectrum residual control of grasses and broadleaf weeds.

RESISTANCE MANAGEMENT
Multiple modes of action to help combat resistant weed populations.

YIELD PROTECTION
Cleaner fields lead to stronger plants and higher yield potential.

GROWER-FOCUSED SOLUTIONS
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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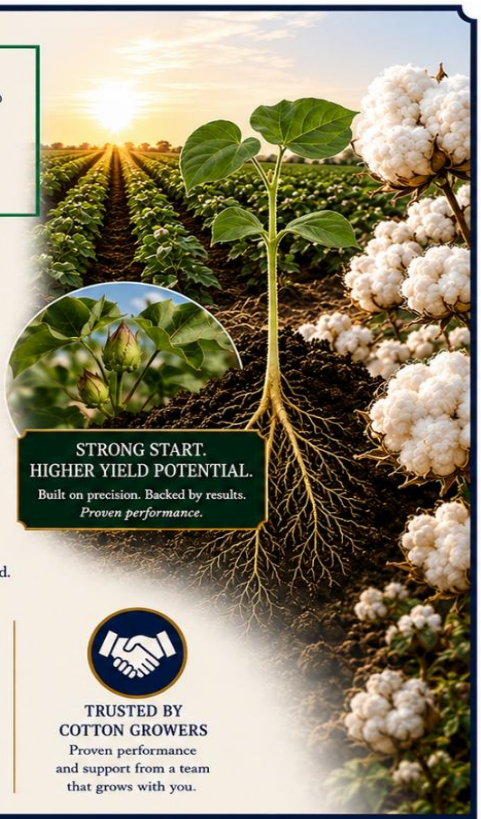
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START STRONG. FINISH STRONG.

AgLogic® helps cotton growers protect yield potential from the very beginning of the season. Through broad-spectrum control of thrips, nematodes, resistance, and starter, AgLogic provides the foundation for stronger plants established, improved vigor, earlier maturity, and greater yield potential.

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.

TRUSTED BY COTTON GROWERS
Proven performance and support from a team that grows with you.

HELPING COTTON GROWERS MAXIMIZE PERFORMANCE FROM PLANTING TO HARVEST

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON

MAPLE COOP GIN

PROUD PARTNER. QUALITY FIRST.

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



QUALITY FOCUSED

Committed to delivering premium fiber quality.

GROWER PARTNERED

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

EFFICIENT OPERATIONS

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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PIMA GROWERS

AMERICA'S FINEST COTTON

BROWNFIELD Farmers
SAW & ROLLER GIN



GROWER OWNED. QUALITY DELIVERED.

Brownfield Farmers Gin is a grower-owned cooperative dedicated to providing superior ginning, classing, and marketing services for Pima cotton. With state-of-the-art equipment, experienced employees, and a commitment to integrity, we work every day to protect fiber quality and maximize value for our members. Rooted in our community and focused on our growers—today and for generations to come.



- 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.

GROWER OWNED COOPERATIVE

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.

8-26-26

PCIA PIMA COTTON PIMA GROWERS IMPROVEMENT ASSOCIATION EST. 2015

JOIN THE AMERICAN PIMA GROWERS NETWORK

Supporting Research, Market Intelligence and Industry Collaboration



Every issue of *The Pima Field & Market Journal* is made possible through the support of growers, industry partners and sponsors committed to the future of American Pima cotton.

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.

WHY MEMBERSHIP MATTERS

- 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

MEMBERSHIP LEVELS

CORPORATE PARTNER

$2,500
annually

For companies and organizations committed to the long-term success of American Pima cotton.

SMALL BUSINESS PARTNER

$1,500
annually

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

INDIVIDUAL PARTNER

$750
annually

For individuals who want to support PCIA and the American Pima cotton industry.

ALL MEMBERS RECEIVE

- Recognition in *The Pima Field & Market Journal*
- Company logo placement in PCIA communications
- Direct link to your company website
- Recognition on PCIA digital platforms
- Opportunitties to share company updates relevant to the American Pima industry
- Visibility among growers, merchants, textile manufacturers, brands, retailers and industry stakeholders

CORPORATE PARTNER BENEFITS (ADDITIONAL)

- ★ Premium logo placement in every issue of *The Pima Field & Market Journal*
- ★ Featured sponsor recognition throughout the year
- ★ Priority placement in PCIA publications and communications

THANK YOU TO OUR INDUSTRY PARTNERS

CALCOT COTTON MARKETING SERVICES — calcot.com

Gowan — gowanco.com

GOWAN COTTON COMPANY — gowancottonco.com

AgLogic Proven Maximum Performance — aglogic.com

BROWNFIELD FARMERS GIN & ROLLER GIN — (806) 637-3351

MAPLE COOP GIN — (806) 927-5501

BECOME A MEMBER TODAY

Together, we can strengthen the future of American Pima cotton.

Contact
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806-200-2851


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