THE PIMA FIELD & MARKET JOURNAL PIMA GROWERS

PIMA GROWERS

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

WEEK ENDING SEPTEMBER 4, 2026



COVER STORY

THE 2026 MONSOON

Fell Short When the Pima Belt Needed It Most

The Southwest monsoon delivered limited and uneven relief across the American Pima belt. All six reference locations finished below normal rainfall while late-season heat kept crop-water demand high.

The result is a divided crop. Fields that maintained root-zone moisture retain favorable boll-load potential; water-limited acreage, especially in West Texas and eastern Arizona, faces the greatest yield and quality risk.

POLICY & TRADE

COTTON-FOR-QUOTA

A Demand Test for Pima

The new Section 301 quota program may reward purchases of U.S. cotton by Bangladesh, Cambodia, Indonesia and Malaysia. For Pima, the direct lift is limited: those four countries represent only 3.8K bales, or 2.2%, of current 170.1K-bale commitments.

PIMA GROWERS POSITION

Reward verified American Pima, U.S. textiles and Western Hemisphere manufacturing.

FEATURED IN THIS ISSUE

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Irrigation Status & Final-Boll Decisions	Page 22	Weekly Crop Progress	Page 15

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
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- Industry Partner Pages

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PROTECTING VALUE FROM FIELD TO MARKET

A Hot, Underperforming Monsoon Meets a New Demand Test

The 2026 crop is being finished under pressure as the industry debates how to build more stable demand for American cotton, Pima and Western Hemisphere manufacturing.

WEEK ENDING SEPTEMBER 4, 2026



PIMA PERSPECTIVE

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

The 2026 monsoon did not deliver the broad relief the Southwest Pima belt needed. From July 1 through August 29, every reference location in the journal's six-station comparison finished below normal rainfall. Las Cruces received only 21% of normal, Deming 24%, Safford 40%, El Paso 44%, Lubbock 46% and Pecos 53%. At the same time, much of Arizona, New Mexico and West Texas ranked among the hottest late-summer periods on record.

The crop result is increasingly divided by water capacity. Fields that could not replace peak demand through bloom and cutout lost yield potential, most clearly in West Texas and eastern Arizona. Fields that maintained root-zone moisture still carry favorable boll loads. September rainfall may help finish unopened bolls, but it cannot restore fruit lost earlier; heavy late moisture can now threaten color, quality and harvest timing.

The same issue - protecting value - appears in Washington's cotton-for-quota plan. Bangladesh, Cambodia, Indonesia and Malaysia may earn relief from the new Section 301 surcharge by purchasing U.S. cotton. More demand for American bales is welcome. Yet those four countries represent only 3.8 thousand bales, or 2.2%, of the current 170.1-thousand-bale Pima order book. Today's five largest Pima destinations - India, Vietnam, Egypt, Peru and China - account for approximately 83%.

Pima Growers supports policies that increase and stabilize cotton demand. But lasting value requires more than a short-term bale purchase. The strongest design would retain a basic reward for U.S. cotton while assigning greater value to verified American Pima, U.S.-made yarn and fabric, and finished goods manufactured in the Western Hemisphere. That approach supports growers, preserves Pima's premium and expands the regional manufacturing base needed for dependable long-term demand.

The field and the market are sending the same message: protect what has already been earned, finish with discipline and build the next layer of value deliberately.

KEY TAKEAWAYS

HOT, DRY MONSOON

All six reference stations finished below normal rainfall; exceptional heat amplified the deficit.

A DIVIDED CROP

Water-limited fields lost yield potential; adequately supplied fields remain favorable.

LIMITED DIRECT PIMA LIFT

Quota countries hold only 2.2% of current U.S. Pima commitments.

FOLLOW THE VALUE

Reward U.S. cotton, then add value for Pima, U.S. textiles and Western Hemisphere production.

THIS WEEK ACROSS THE JOURNAL

SIGNAL	CURRENT READING
Monsoon rainfall	All 6 stations below normal
Largest relative shortfall	Las Cruces: 21% of normal
Greatest yield downside	West Texas + eastern Arizona
U.S. Pima commitments	170.1K bales
Top five buyer share	Approximately 83%
Quota-country share	3.8K bales / 2.2%
Western Hemisphere share	18.1K bales / 10.6%

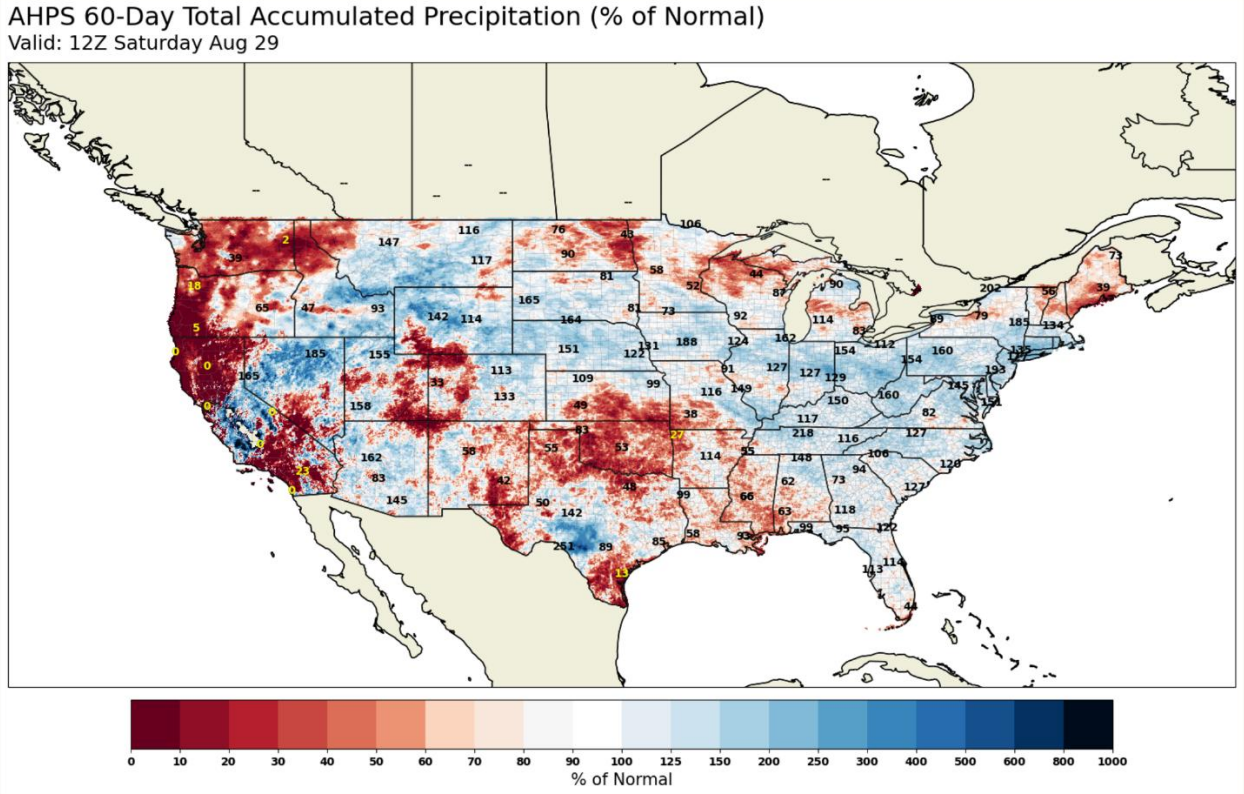
Finish the crop already earned - then build demand that rewards the entire Pima value chain.

Protect fiber quality now. Stabilize demand and expand Western Hemisphere manufacturing next.

WEATHER & RISK INTELLIGENCE

2026 Monsoon Underperforming Thus Far Across the Pima Belt

Below-expected rainfall, above-average temperatures and limited irrigation capacity are reducing 2026 yield potential in the most water-constrained Pima areas.



Sixty-day precipitation through August 29. Red and brown areas indicate below-normal rainfall; blue areas indicate above-normal rainfall. The national view shows widespread dryness across southern New Mexico and West Texas, with sharply localized storm benefits. Source: NOAA/NWS Advanced Hydrologic Prediction Service.

THE CENTRAL FINDING

The monsoon has underperformed thus far. Water-limited fields lost yield potential; adequately supplied fields remain favorable.

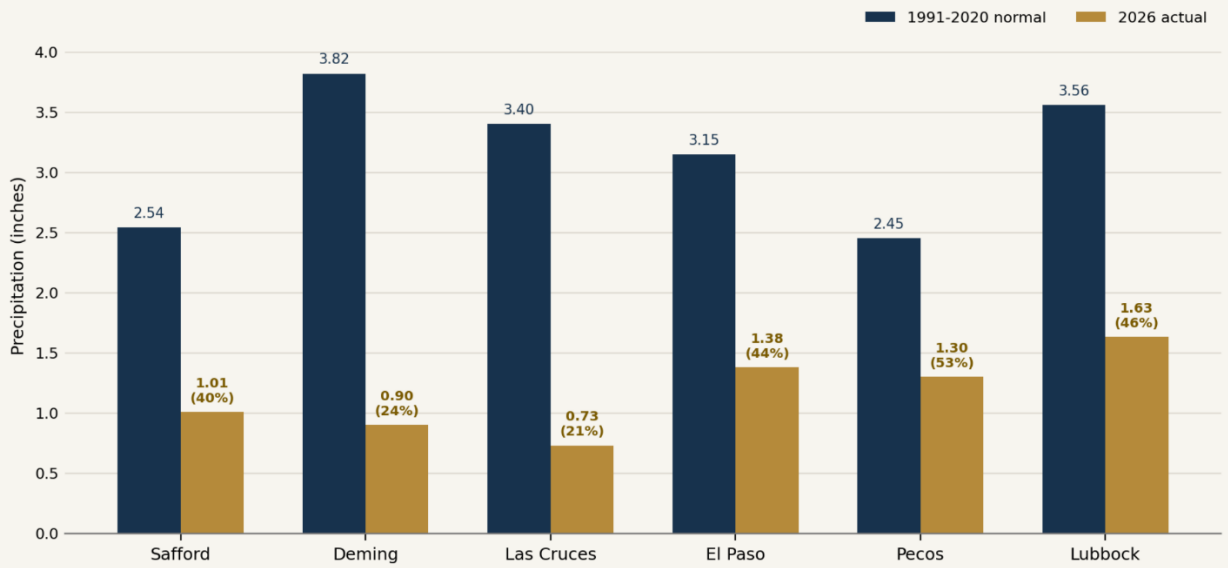
Through August 29, the North American monsoon has underperformed across most of the Southwest Pima-production region. Safford, Deming, Las Cruces and El Paso received the clearest monsoon influence, while Pecos and Lubbock remained along or beyond the circulation's eastern fringe. Even in the core production areas, however, moisture was not widespread or regularly spaced enough to materially reduce dependence on scheduled irrigation.

The disappointment is more pronounced because the preseason signal leaned wetter. In June, NOAA's National Integrated Drought Information System reported that seasonal forecasts favored above-average monsoon precipitation. By August 20, the same federal assessment described the monsoon as "lackluster," noting that isolated rains had failed to deliver meaningful region-wide relief.

RAINFALL PERFORMANCE

Actual Rainfall Fell Short at Every Reference Location

The chart compares the same July 1-August 29 period shown on the AHPS map. Every selected Pima-area reference station finished below its 1991-2020 normal for the 60-day period.



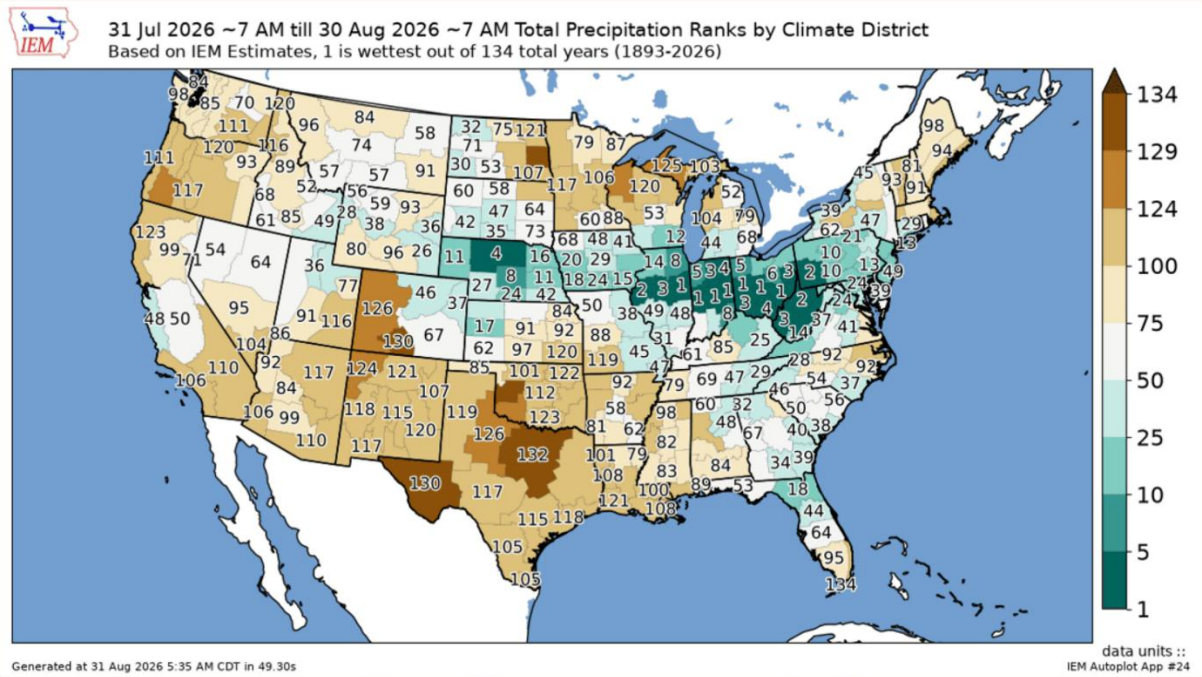
Actual versus normal precipitation, July 1-August 29, 2026. Percentages above gold bars show actual rainfall as a share of normal. All six stations were below normal; Las Cruces and Deming recorded the most severe relative shortfalls.

Location	Actual	Normal	% normal	Assessment
Safford	1.01 in	2.54 in	40%	Substantial deficit
Deming	0.90 in	3.82 in	24%	Largest shortfall
Las Cruces	0.73 in	3.40 in	21%	Largest relative shortfall
El Paso	1.38 in	3.15 in	44%	Intermittent benefit
Pecos	1.30 in	2.45 in	53%	Dry August limited benefit
Lubbock	1.63 in	3.56 in	46%	Weak late-summer pattern

Source methodology matches the recurring Regional Weather Status: Iowa Environmental Mesonet ASOS/AWOS daily summaries and NCEI 1991-2020 normals. Recurring stations are KSAD, KDMN, KELP and KLBB; KLRU and KPEQ are supplemental reference stations for Las Cruces and Pecos. Totals are preliminary and may be revised.

REGIONAL RAINFALL CONTEXT

August Ranked Among the Driest in Key Production Areas



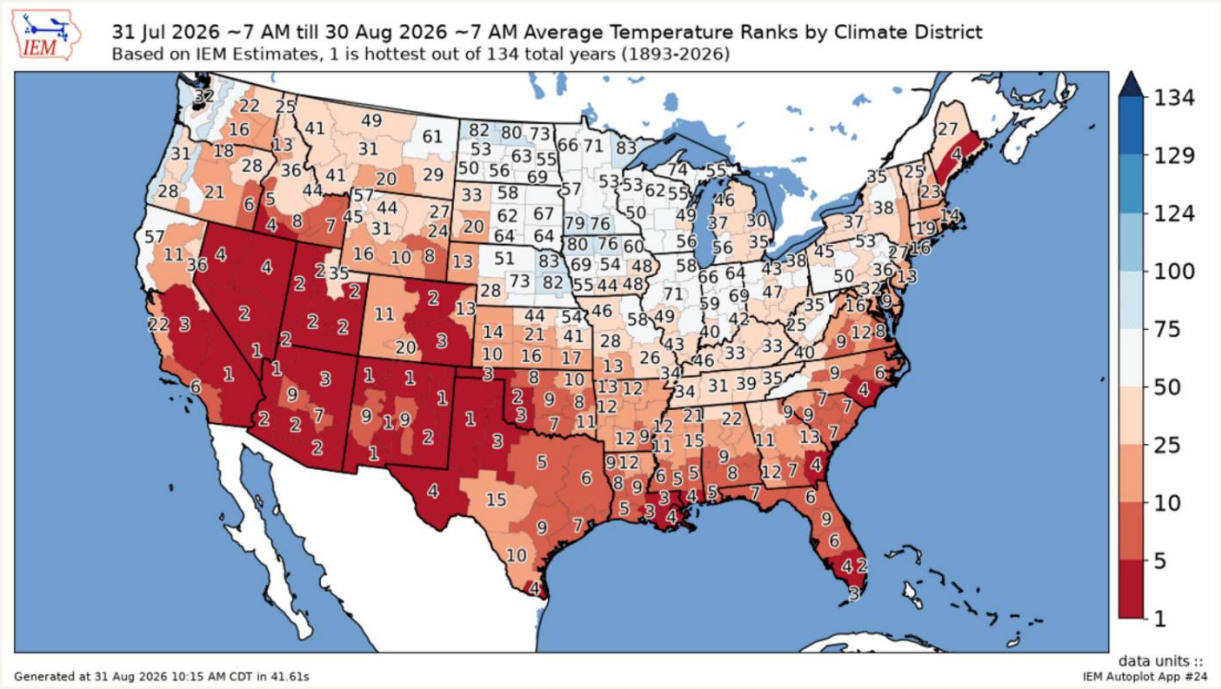
Thirty-day precipitation rank, July 31-August 30. A rank of 134 represents the driest such period in the 134-year record; higher brown-shaded ranks therefore indicate exceptional dryness. West Texas and eastern New Mexico include districts ranking among their driest on record, reinforcing that isolated storms did not amount to broad monsoon relief. Source: Iowa Environmental Mesonet climate-district estimates.

The climate-district ranks add important context to the station totals. Much of eastern New Mexico and West Texas ranked between roughly the 117th and 132nd wettest out of 134 years - placing the period among the driest on record. Southern Arizona was also broadly dry, despite isolated pockets of heavier storm rainfall.

This is the pattern growers experienced in the field: scattered storms created local winners, but broad production areas remained dependent on irrigation through peak heat. Regional averages therefore overstate the crop benefit where rainfall was brief, intense or poorly aligned with the highest water-demand periods.

HEAT EXPOSURE

Exceptional Heat Amplified the Moisture Deficit



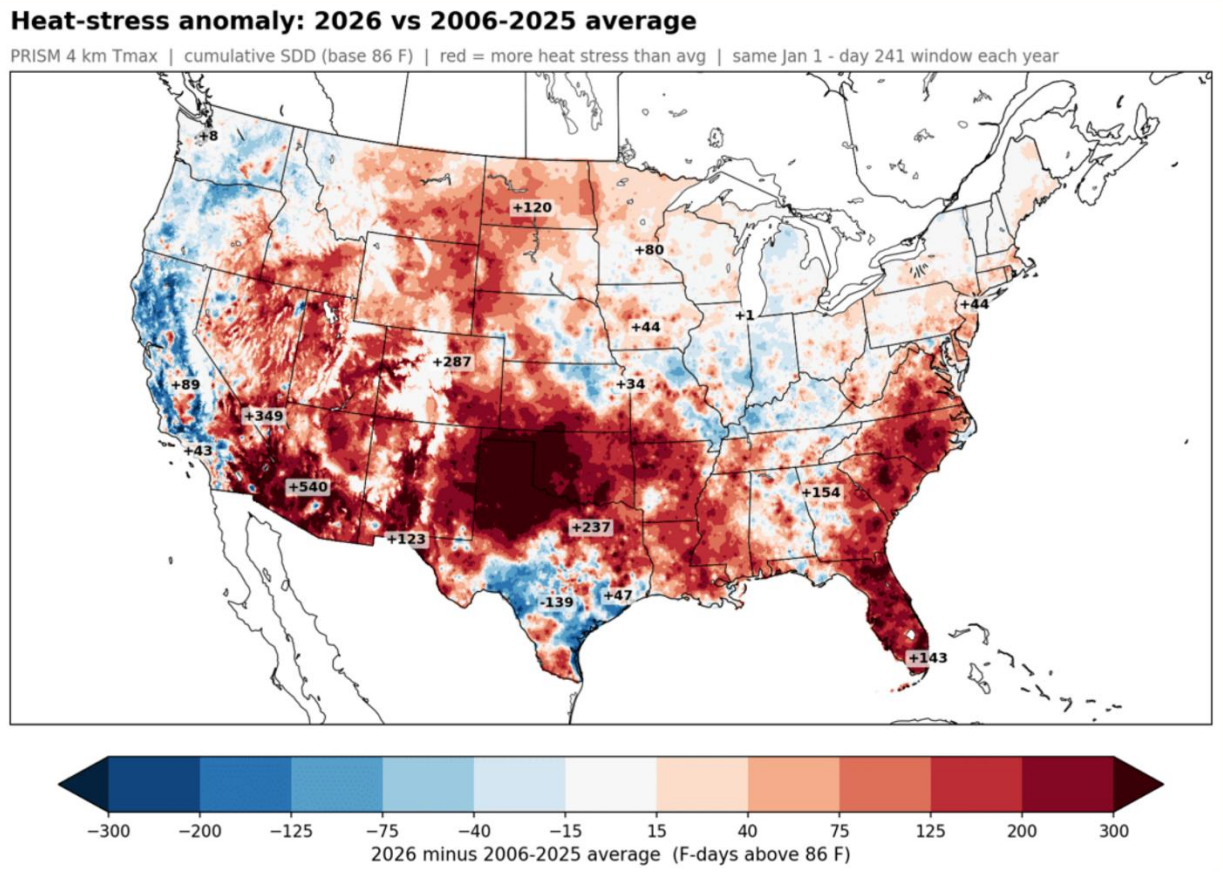
Thirty-day average-temperature rank, July 31-August 30. A rank of 1 represents the hottest such period in the 134-year record. Much of Arizona, New Mexico and West Texas ranked within the hottest few years, with several climate districts at or near record warmth. Source: Iowa Environmental Mesonet climate-district estimates.

Across the Pima belt, the 30-day temperature map is nearly the inverse of the rainfall map: the areas missing monsoon moisture were also among the hottest. Districts across Arizona and New Mexico commonly ranked in the hottest one to three such periods on record, while much of West Texas ranked within the hottest ten.

NOAA reported that July 2026 was Arizona’s fourth-warmest July on record and New Mexico’s second warmest. Nearly every county across the broader Intermountain West experienced its warmest January-July period on record.

CUMULATIVE CROP EXPOSURE

Heat Stress Built Well Beyond Recent-Average Levels



Accumulated heat-stress anomaly through day 241. Red areas accumulated more stress-degree days above 86°F in 2026 than the 2006-2025 average. Large positive anomalies cover the Southwest and Southern High Plains, including approximately +349°F-days in Arizona, +287°F-days in eastern New Mexico and strongly elevated exposure across the Texas Panhandle. Analysis based on PRISM 4-km daily maximum temperature.

HEAT AND WATER STRESS

Related - but not identical. High temperatures increase evapotranspiration and can intensify water stress when irrigation cannot keep pace. Water stress limits stomatal function, photosynthesis, fruit retention and boll filling. Heat can also directly impair reproduction by reducing pollen viability, increasing nighttime respiration and shortening the effective boll-filling period.

In 2026, the greatest yield risk occurred where both stresses overlapped. Adequately irrigated fields avoided the most damaging water-stress effects, but prolonged daytime heat and warm nights may still have reduced reproductive efficiency and boll-filling duration.

Heat Reduced the Value of Every Inch

In West Texas, late-August temperatures returned to the upper 90s and low 100s, with the Midland-Odessa forecast area running roughly 10°F above climatology.

For irrigated Pima cotton, rainfall value depends on more than the gauge total. A moderate rain accompanied by cloud cover can lower evapotranspiration for several days. A short, high-intensity storm may instead produce runoff, wind damage and only shallow soil wetting. Under persistent heat, light rain is consumed quickly and rarely substitutes for a full irrigation.

PRODUCTION-AREA ASSESSMENT

Localized Relief, Continued Irrigation Dependence

Safford, Arizona

Safford recorded only about 40% of normal precipitation during the 60-day comparison period. Storms supplied useful field-level offsets, but coverage remained too variable to change irrigation planning across the Upper Gila Valley.

Deming, New Mexico

Deming received less than one-quarter of normal rainfall during the 60-day period. The result is a clear reversal from the wetter preseason outlook and underscores how localized southwestern New Mexico storms remained.

Las Cruces, New Mexico

Las Cruces recorded the largest relative shortfall, receiving only about 21% of normal rainfall at KLRU. Brief storm benefits did not provide dependable soil-profile recharge or meaningfully reduce irrigation dependence.

El Paso, Texas

El Paso received about 44% of normal rainfall. Periodic thunderstorms reduced crop water demand locally, but hot, dry intervals and rapid runoff limited lasting improvement across the lower Rio Grande production area.

Pecos, Texas

Pecos remained on the monsoon's eastern fringe. July rainfall provided some help, but an exceptionally dry August left KPEQ at approximately 53% of normal for the 60-day period. Persistent heat sharply reduced the duration of any field benefit.

Lubbock, Texas

Lubbock received approximately 46% of normal rainfall. The Southern High Plains experienced scattered summer storms rather than a sustained monsoon-driven wet pattern. Renewed heat during cutout limited the value of the earlier moisture.

MONSOON TIMING

Official calendar: June 15-September 30 - 108 days.
Typical effective onset: Moisture commonly reaches the Southwest during early July; average onset is near July 3 in southwestern New Mexico and July 9 along the central Rio Grande Valley.
Typical decay: The core circulation commonly weakens in early to mid-September as westerly flow returns. The effective wet season is therefore closer to 10 weeks than the full official calendar.
Late-season exception: Eastern Pacific tropical moisture can still produce significant rainfall through late September.

SEPTEMBER RISK OUTLOOK

September Outlook: Opportunity and Risk

NOAA's updated August 31 outlook continues to favor above-normal September precipitation across much of the Southwest. The temperature outlook changed materially from the mid-August release: early-month troughing reduces the earlier broad western heat signal, leaving equal chances across much of the interior West while above-normal temperature odds persist along the southern tier and are strongest over the central Great Plains.

For September 12-25, the Week 3-4 outlook also tilts toward above-normal precipitation in the Desert Southwest and above-normal temperatures across much of the southern United States. Forecast confidence remains limited: NOAA notes that comparable monsoon guidance did not verify consistently earlier in the summer. The outlook identifies a credible late-moisture opportunity - not a guarantee of crop recovery.

Yield Impact Is Now Largely Established

The combination of deficient monsoon rainfall, above-average temperatures and limited regional water capacity is expected to reduce 2026 yields most clearly in West Texas and eastern Arizona. The greatest risk is concentrated in fields where irrigation systems could not replace peak daily crop water use through bloom and cutout. Heat accelerated crop development while insufficient water reduced the plant's ability to retain and fill fruit.

The outcome is not uniform. Fields that maintained adequate soil moisture and kept pace with crop demand continue to show favorable boll loads and yield prospects. The regional crop should therefore be viewed as increasingly divided between water-limited fields with reduced yield potential and adequately supplied fields that remain favorable thus far.

September Rain Offers Marginal Yield Benefit

Even average to above-average September rainfall would provide only marginal benefit to the current crop. Most yield-determining bolls are already set, and cotton is moving through cutout, first open boll and boll opening. Late moisture cannot fully restore fruit lost or limited during peak bloom, nor can it reverse reduced boll size caused by earlier water stress.

A short rain may assist fields with unopened bolls and depleted profiles, but the risk-benefit balance is changing quickly. Heavy or repeated rainfall in late September or early October could weather exposed lint, reduce color and quality, increase boll rot, hard lock and light spot, delay harvest aids and harvest, and stimulate unwanted vegetative regrowth.

Pima Growers Assessment Through August 29

The 2026 monsoon should be characterized as hot and underperforming thus far. The greatest yield losses are expected where exceptional heat and insufficient water capacity occurred together. West Texas and eastern Arizona carry the greatest downside where water delivery could not meet demand. Adequately irrigated fields remain favorable because they avoided the most damaging water-stress effects, although direct heat effects may still have reduced reproductive efficiency and boll-filling duration.

September may improve final rainfall statistics, but it is unlikely to materially recover regional yield potential. From this point forward, widespread heavy moisture may pose a greater threat to fiber quality and crop finish than an opportunity to add meaningful production.

Companion Pima Growers Agronomy Feature: "Heat Stress vs. Water Stress in Cotton: Different Causes, Overlapping Consequences." Water stress limits capacity; heat stress disrupts function. Together, they can reduce both lint yield and the quality built into each surviving fiber.

PRIMARY SOURCES

NOAA/NIDIS, "2026 Monsoon Drought Status Update for the Southwest U.S.," June 18, 2026 — drought.gov/drought-status-updates/2026-monsoon-drought-status-update-southwest-us-2026-06-18

NOAA/NIDIS, "Drought Status Update for the Intermountain West," August 20, 2026 — drought.gov/drought-status-updates/drought-status-update-intermountain-west-2026-08-20

NOAA/NWS AHPS, 60-Day Total Accumulated Precipitation (% of Normal), valid 12Z August 29, 2026. Iowa Environmental Mesonet ASOS/AWOS daily summaries and NCEI 1991-2020 normals.

Iowa Environmental Mesonet Autoplot #24, climate-district precipitation and average-temperature ranks for July 31-August 30, 2026; ranks are based on IEM estimates for 1893-2026.

PRISM Climate Group 4-km daily maximum-temperature grids; heat-stress anomaly calculated as cumulative stress-degree days above 86°F for January 1-August 29, 2026 versus the 2006-2025 average.

NOAA Climate Prediction Center, updated September 2026 Monthly Outlook issued August 31; Week 3-4 Outlook valid September 12-25, updated August 28, 2026.

National Weather Service: official monsoon season June 15-September 30 and regional onset climatology. University of Georgia Extension, "End of Season - Cotton Irrigation Management," August 21, 2026.

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STATE OF AMERICAN PIMA

Fiber Value, Supply and Export Demand

Benchmarking American Pima against competing fibers and tracking the market's supply-demand position.

WEEK ENDING SEPTEMBER 4, 2026

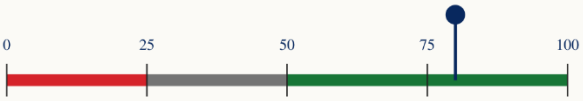
EXECUTIVE SUMMARY

American Pima's value position remains favorable. The current premium over Upland is $0.8457 per pound, above the prior five-year average spread of $0.8200. The current Pima-to-Upland price ratio is 198%.

Week 4 commitments reached 170.1K bales, 70.8% above the same point last year. Weekly exports were 4.6K bales; shipments to date reached 26.2K bales, or 15.4% of commitments. Outstanding sales remain substantial at 144.0K bales.

- **Total Commitments:** 170.1K bales | +70.8% YoY
- **Weekly Exports:** 4.6K bales
- **Current Pima/Upland Spread:** $0.8457/lb

AMERICAN PIMA VALUE POSITION



+$0.8457/LB

PREMIUM OVER UPLAND

Long-Staple Price Ratio: 198%

Five-Year Average Spread: $0.8200/lb

Outlook: FAVORABLE

FIBER MARKET BENCHMARKS | PCIA INDICATIONS

INDICATOR	CURRENT	COMPARISON / SIGNAL
American Pima Landed Southeast Asia	$1.86	Premium
American Pima Spot	$1.71	Premium
Organic Pima	$2.30	Premium
Giza 94 Landed Southeast Asia	$1.50	Neutral
Israel ELS Landed Southeast Asia	$1.85	Premium
Xinjiang Long Staple Type 137	$1.83	Premium
U.S. Pima - Prior 5-Year Average	$1.65	Reference
Upland Spot	$0.8643	Discount
Upland - Prior 5-Year Average	$0.8300	Reference
Prior 5-Year Average Spread	$0.8200	Reference
Current Pima/Upland Spread	$0.8457	Favorable
WTI Crude Oil	$91.48	External Cost Headwind
Polyester Staple Fiber	$0.54/lb	Cotton Support

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

DEMAND & CURRENT FACTS

Total Commitments	170.1K
Net Sales - Week 4	1.8K
Weekly Exports	4.6K
Shipped to Date	26.2K
Outstanding Sales	144.0K

COMMITMENTS	ACREAGE VS 2024	PRODUCTION VS 2024	COMMITMENTS SHIPPED
+70.8% YoY	-26.2%	-15.3%	15.4%

WEEK 4 TRADE DETAIL

NEW SALES BY MARKET

THOUSAND RUNNING BALES

India	1.1
Thailand	0.5
Pakistan	0.2
Japan	0.1
TOTAL	**1.8****

EXPORTS BY MARKET

THOUSAND RUNNING BALES

Vietnam	1.5
India	1.2
Costa Rica	0.9
Other markets*	1.0
TOTAL	**4.6**

Sources: USDA FAS Export Sales; Supima Weekly Pima Market Report - Week 4; PCIA estimates. *Derived balance. **Rounded market detail.

SUPIMA®

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 4 · Ending August 27, 2026 · MY Aug 2026 – Jul 2027 · Week 4

The first month of MY 2026/27 closes at 170.1k bales committed — 71% ahead of last year — as Vietnam begins to ship

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
1.8 k RB	**4.6** k RB	**170.1** k RB	**15.4** %	**144.0** k RB
▼ 0.2 no cancels	▼ 4.0 vs 8.6	▲ 70.7% YoY LY 99.6	26.2 of 170.1 · LY 35.0%	▼ 2.8 needs ~3.0k/wk over 48 wks

THIS WEEK IN THE MARKET

Sales went quiet; the book did not give anything back. Net sales of 1.8k RB — India (1.1k), Thailand (0.5k), Pakistan (0.2k) — came with essentially zero cancellations, closing the marketing year's first month at 170.1k committed versus 99.6k a year ago. Four weeks in, mills have written 60.4k of net new business on top of the 109.7k forward book carried into the year.

Vietnam started converting its book. Exports eased to 4.6k RB, but the mix mattered: Vietnam's first deliveries of the season (1.5k) led the week, with India (1.2k) and Costa Rica (0.9k) behind. The second-largest holder of commitments (39.9k) shipping is what an early season is supposed to look like.

The pace optics still favor last year; the book does not. Accumulated exports of 26.2k trail last year's start by 25%, and 15.4% of commitments have shipped versus 35.0% — a function of a book 71% larger, not slower mills. India's anchor position reached 71.0k, 41.7% of everything committed and 2.2× its year-ago book.

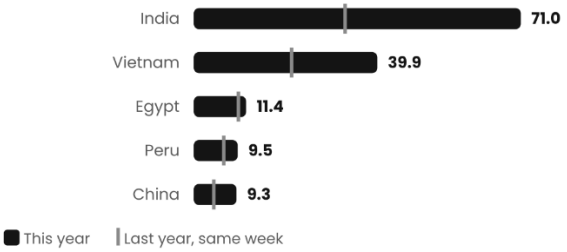
› Month one closes at 170.1k committed, +70.7% YoY — the strongest opening month in this data.

› Vietnam joined the shipping lanes (1.5k) — the book's second pillar is now converting, not just holding.

› The order book (144.0k) needs ~3.0k/wk to clear; the recent pace is 6.6k — 2.2× coverage.

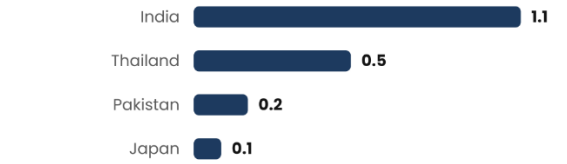
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



WEEK 4 NEW SALES BY MARKET

k RB, net new business



SEASON SHIPMENT PROGRESS

% of commitments shipped



Season outlook: 48 weeks remain. Outstanding sales of 144.0k RB need ~3.0k/wk; the last two weeks averaged 6.6k. The 25% accumulated-export gap to last year should keep narrowing as the season's much larger book converts to deliveries.

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 29

August closed as the Supima index's first clean YoY month of the new marketing year: **$15.5M, up ~32% from last August**, with the trailing twelve months at $225M after another upward panel revision. Nordstrom settled at **$1.11M (-4.8%)** as the relaunched fall line finds its baseline, and Original Favorites eased 17% to $82K — still roughly double its July run-rate, all at full price.

Market Index

SUPIMA-TAGGED · 81 BRANDS



$225M TTM

1,277 tagged products, monthly. Top users: Nordstrom, Kohl's, Ariat, SPANX, Original Favorites. August ran ~32% above last August.

Nordstrom

OWN-LABEL SUPIMA® · 79 SKUS



$1.11M

▼ 4.8% WoW

20,350 units

Post-relaunch baseline forming: the LS crewneck led at $190K across 79 active SKUs; long sleeves keep the top slots.

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; the mid-August fall launches enter this board next week.

Sources & method: USDA FAS Export Sales Reporting, CWR, American Pima raw cotton, wk 4 ending 08/27/2026 (MY 26/27) · Particl retail estimates (modeled): market index = Supima-tagged; brand cards = Supima-titled, windows Aug 23–29 vs Aug 16–22. 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

Currency, energy, cotton values, freight, interest rates and China manufacturing demand.

WEEK ENDING SEPTEMBER 4, 2026

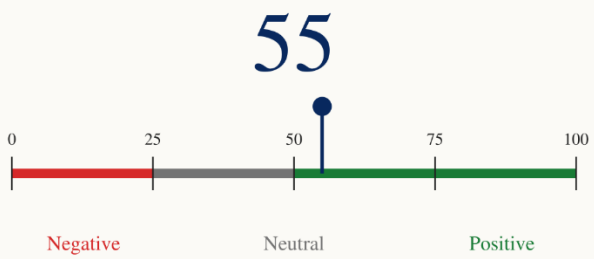
Executive Summary

Outside-market conditions remain slightly positive for American Pima, but the weekly balance weakened. A softer dollar, lower ocean freight and firmer polyester values improved competitiveness, while higher energy costs, rising interest rates and weaker cotton futures created meaningful headwinds.

WTI crude settled at $91.48 per barrel. The U.S. Dollar Index closed at 99.16, December 2026 ICE Cotton No. 2 settled at 86.43 cents per pound, and the Freightos Baltic Index eased to $3,532.

China's official manufacturing PMI improved to 49.8 but remained below the 50-point expansion threshold. The 10-year Treasury yield rose to 4.79%, keeping financing pressure elevated.

Pima Market Environment Index



SLIGHTLY POSITIVE

Weekly: Mixed-to-Negative **90-Day: Moderately Positive** **Change: -10**

Primary Risks: Energy Costs and China Demand

GLOBAL MARKET SNAPSHOT

INDICATOR	SEPT. 4 VALUE	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	**$91.48**	Rising	Headwind
U.S. Dollar Index (DXY)	**99.16**	Falling	Positive
ICE Cotton No. 2 - Dec. 2026	**86.43¢**	Falling	Headwind
China PSF Spot	**$0.54/lb**	Rising	Positive
Ocean Freight (FBX)	**$3,532**	Falling	Positive
U.S. 10-Year Treasury	**4.79%**	Rising	Headwind
China Manufacturing PMI	**49.8**	Improving / Contracting	Primary Headwind

Competitive Position: Slightly Positive

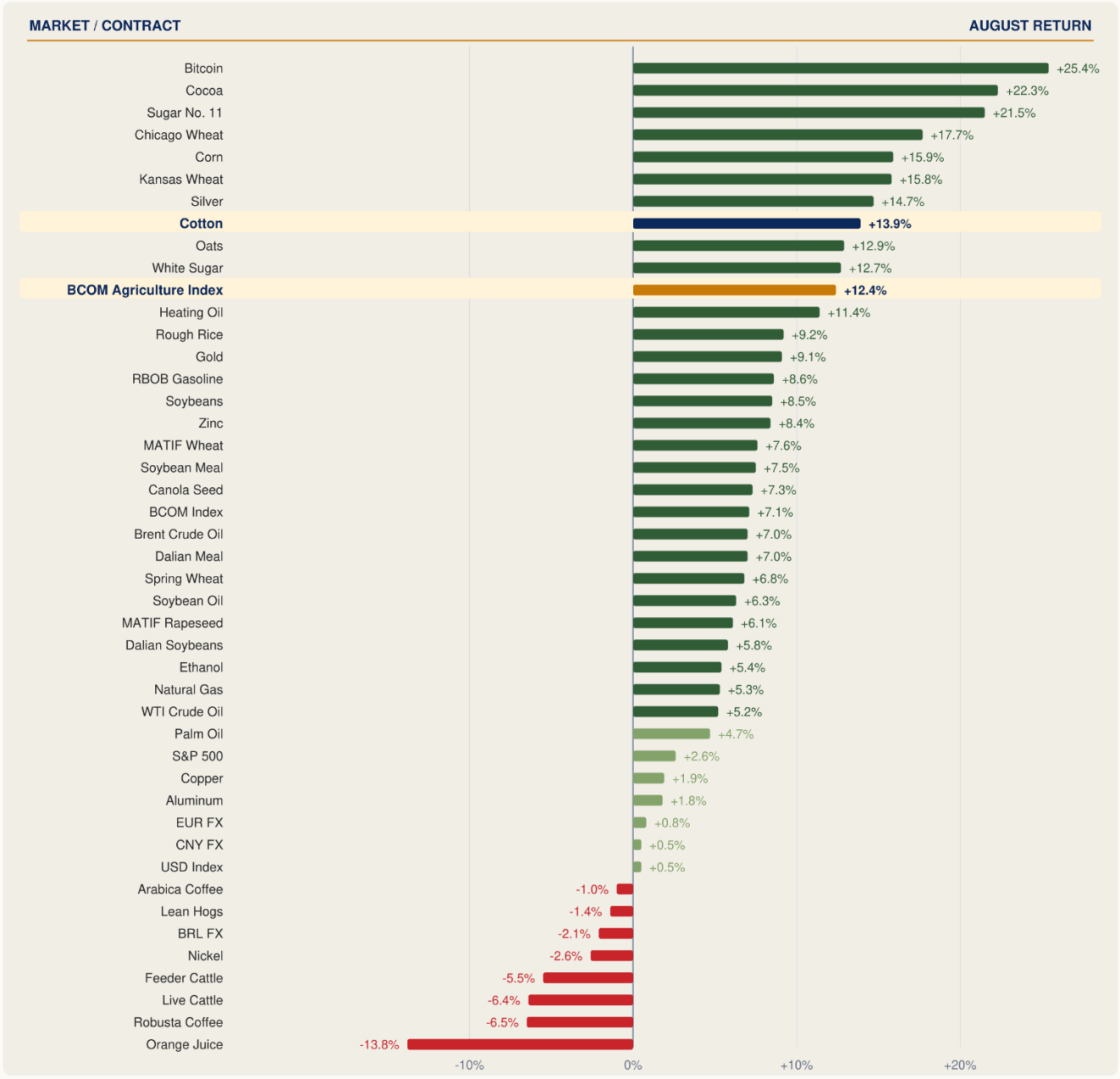
PMEI is a comparative market-environment index; it is not a price forecast or stand-alone demand model.

Sources: Trading Economics; Barchart/MarketWatch; Freightos Baltic Index; SunSirs; U.S. Treasury; China NBS.
September 4, 2026 market values. PSF spot converted from RMB/metric ton using the September 4 USD/CNY rate.
China PMI is the latest official release available at the market close. Values may reflect delayed benchmark publication.

AUGUST 2026 MARKET PERFORMANCE

Cotton ranked among the month's leading markets as agriculture posted broad gains.

COTTON	BCOM AGRICULTURE	COTTON RANK	MARKETS HIGHER
+13.9%	+12.4%	8 OF 45	37 OF 45



PIMA GROWERS MARKET NOTE

Cotton gained 13.9% in August, outperforming the broader BCOM Agriculture Index by 1.5 percentage points.

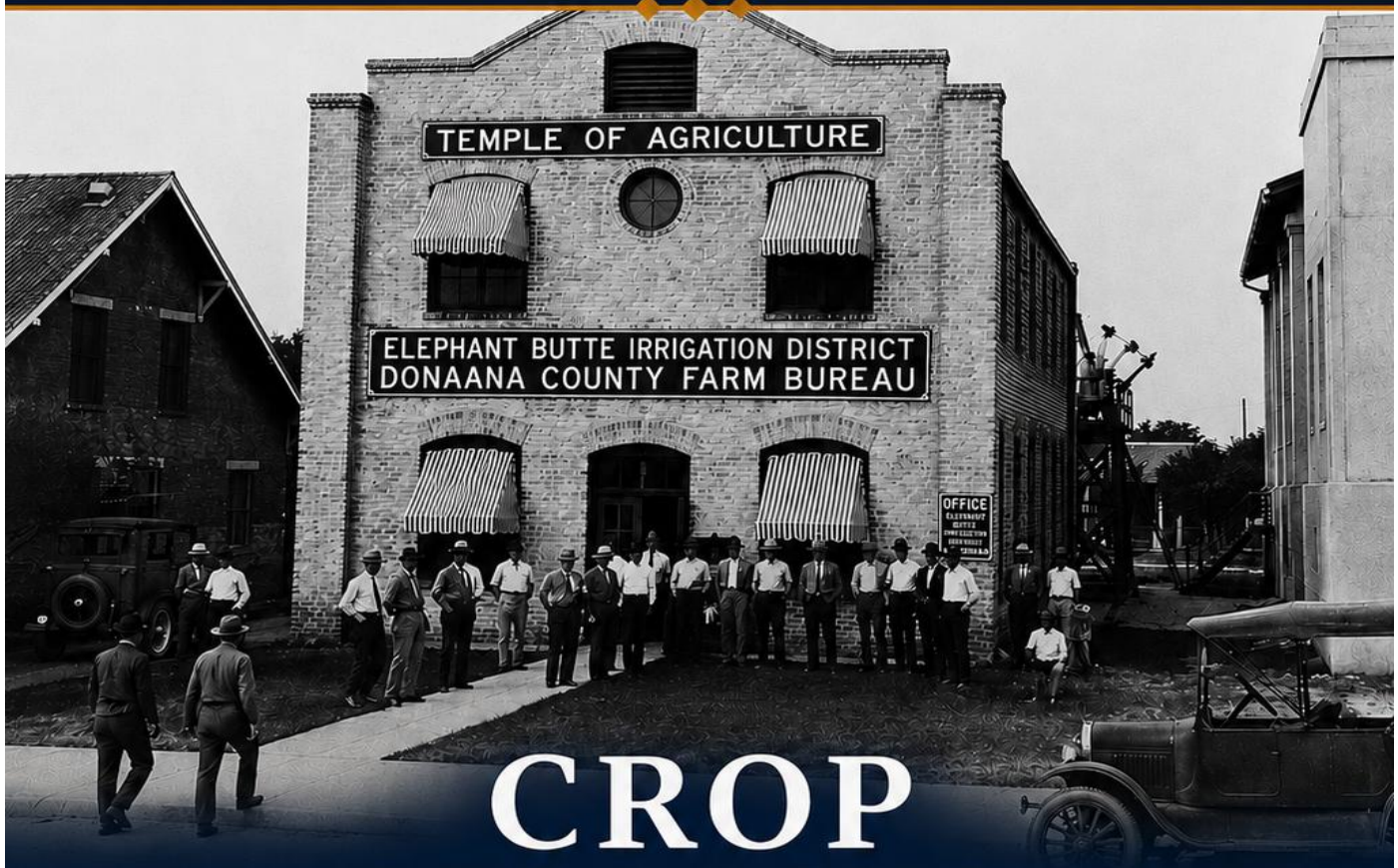
Source: supplied August 2026 performance chart. Returns shown as reported; not independently verified.
Methodology: front-month active futures contracts and spot contract prices; returns are not roll-adjusted.


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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 8-31-26
WEEK ENDING 9-4-26

Executive Field & National Crop Summary

U.S. cotton conditions improved after three consecutive weekly declines. The 15-state crop rose to 39% Good to Excellent from 37% last week, but remains 12 points below the 51% rating one year ago.

Development is near the seasonal pace: 89% of cotton is setting bolls versus the 91% five-year average, while 29% has open bolls, one point ahead of average. Arizona is the most advanced Pima state at 87% open.

Pima-belt conditions diverged. California held at 95% G+E. Arizona fell 12 points to 73%, while Texas improved three points to 22%. Late-season yield and exposed-lint risk now depend increasingly on water supply, heat, and harvest weather.

U.S. COTTON CONDITION

39% G+E

0 — 100

Stressed | Watch | Favorable

FIRST IMPROVEMENT IN FOUR WEEKS

Up 2 points week over week

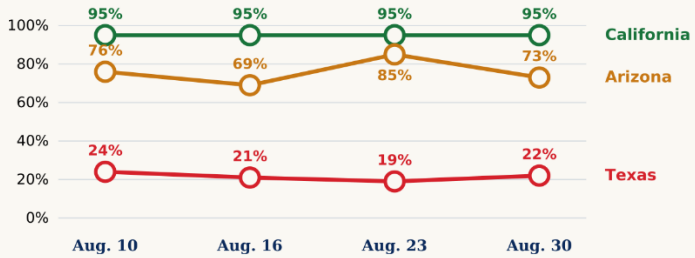
Year Ago: 51%

USDA PIMA-BELT PROGRESS SCORECARD

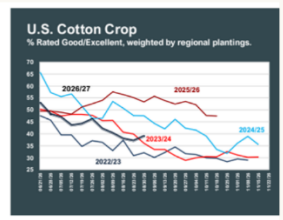
STATE	SETTING BOLLS 2026 / AVG.	BOLLS OPEN 2026 / AVG.	GOOD + EXCELLENT	WEEKLY TREND
CALIFORNIA	95 / 94	10 / 8	95%	UNCHANGED
ARIZONA	99 / 100	87 / 68	73%	DOWN 12 PTS
TEXAS	84 / 88	27 / 30	22%	UP 3 PTS
NEW MEXICO	N/A	N/A	N/A	NOT REPORTED

USDA state figures cover all cotton and are used here as Pima-belt context. 2026 / AVG. compares Aug. 30, 2026 with 2021-2025. New Mexico is not separately reported.

PIMA-BELT CONDITION TREND



MULTI-YEAR CONTEXT



CALIFORNIA - LEADING:

95% G+E; boll set reaches 95%; 10% open.

ARIZONA - REVERSAL:

Condition falls to 73%; crop reaches 87% open.

TEXAS - PRIMARY RISK:

Only 22% G+E despite a 3-point weekly gain.

Sources: USDA NASS Crop Progress, released Aug. 31, 2026; Pima Growers field intelligence; supplied multi-year crop-condition chart.

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 cumulative day and night heat exposure - not a stand-alone yield-loss model.

DATA THROUGH SEPTEMBER 4, 2026

Executive Summary

Daytime heat remained the principal driver of cumulative thermal exposure. Safford retains the highest index at 112 points, followed by El Paso at 96, Deming at 86, Lubbock at 80 and Fresno at 74.

During Aug. 29-Sept. 4, Lubbock added seven qualifying hot days, El Paso six, Safford and Deming four each, and Fresno one. No monitored station added a qualifying warm night.

The index is consistent with the companion weather page: weekly maximum-temperature ranges were 83-97 F at Fresno, 86-105 F at Safford, 90-100 F at Deming, 92-100 F at El Paso and 95-101 F at Lubbock.

Interpret cumulative exposure with crop stage, available root-zone water, canopy recovery, fruit load and event duration. It is not an ET calculation or irrigation recommendation.

How to Read the Index

Day stress: +1 when daily Tmax is at least 95 F.

Night stress: +1 when daily Tmin is at least 79 F.

When both thresholds occur in the same local 24-hour station day, count two total points and one combined-stress day.

Risk categories compare accumulated exposure from the listed planting dates. They do not estimate yield loss, crop ET or plant-water status.

THERMAL STRESS SUMMARY BY REGION

Region	Day stress (Tmax >= 95 F)	Night stress (Tmin >= 79 F)	Combined days (day + night)	Total points (day + night)	7-day addition	Risk
Safford, AZ	96	16	16	**112**	**+4**	High
Fresno, CA	73	1	1	**74**	**+1**	High
El Paso, TX	85	11	11	**96**	**+6**	High
Lubbock, TX	78	2	2	**80**	**+7**	High
Deming, NM	86	0	0	**86**	**+4**	High

RISK KEY: High >= 35 | Moderate-High 30-34 | Moderate 20-29 | Low-Moderate <= 19

Counts use local-day airport summaries and accumulate from the planting dates shown. Deming includes five qualifying days reconstructed from underlying IEM observations where daily maximum summaries were unavailable.

Planting dates: Safford 4/15 - Fresno 4/10 - El Paso 4/20 - Lubbock 5/1 - Deming 4/20

COMPANION-PAGE CONSISTENCY CHECK

Weather period	Aug. 29-Sept. 4 local station days
Weekly heat ranges	Match Regional Weather Status
DD60 relationship	Separate 60 F base / 86 F cap calculation
ET relationship	No ET or irrigation requirement inferred from this index

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

Source: Iowa Environmental Mesonet ASOS/AWOS daily summaries and underlying observations. Data through Sept. 4, 2026.

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 using crop stage, heat units, rainfall and root-zone water.

WEEK ENDING SEPTEMBER 4, 2026

Executive Irrigation Summary

Late-season water decisions now vary sharply by field. Modified DD60 gains ranged from 99 at Fresno to 143 at El Paso. Observed rainfall totaled 0.11 inch at Deming and 0.14 inch at Safford; Fresno and Lubbock were dry, while El Paso received only trace amounts.

Using a standardized planning ETc assumption of 0.30 inch/day, modeled net weekly crop-water requirement averaged 2.06 inches. Limited rain slightly lowered near-term requirements in New Mexico and eastern Arizona; the other locations remain field-check decisions.

Protect the last harvestable bolls until they are about 40 days old. Do not terminate irrigation by date alone.

WEEKLY IRRIGATION PLANNING STATUS

HIGH



Standardized planning requirement: 2.06 in

Status: High - taper by field; verify soil water

REGIONAL IRRIGATION DECISION TABLE

Location	Crop stage / Cumulative DD60*	Weekly DD60 gain	Planning ETc assumption (in/day)	Effective rain (in)	Root-zone status	Modeled net requirement (in)	Decision cue
Deming, NM	First open boll - 2,085	**+128**	0.30	0.09	Field check	**2.01**	Final furrow; drip continues
Fresno, CA	Advanced open boll - 2,202	**+99**	0.30	0.00	Field check	**2.10**	Near final; verify boll age
El Paso, TX	Open boll - 2,009	**+143**	0.30	0.00	Field check	**2.10**	Protect last harvestable bolls
Safford, AZ	Open boll - 1,963	**+128**	0.30	0.12	Field check	1.98	Check recovery; irrigate by need
Lubbock, TX	Open boll - 1,662	**+138**	0.30	0.00	Field check	**2.10**	Protect Aug. 10 bolls to Sept. 19

*DD60 adds Aug. 29-Sept. 4 gains to Aug. 28 totals (60 F base/86 F cap). The 0.30 in/day ETc is a planning assumption, not regional ET; schedule fields with local ETo x Kc, soil water and applied irrigation.

LATE-SEASON WATER PRIORITIES

NEW MEXICO
The crop is in good condition at 27-30 total nodes and first open boll. Final furrow irrigation is in progress; drip irrigation can continue closer to defoliation as field demand warrants.

WEST TEXAS
A boll set Aug. 10 reaches about 40 days old Sept. 19. Daytime wilt is acceptable only when plants recover by the next morning; persistent stress can reduce boll weight and fiber quality.

FINAL-IRRIGATION CHECK

- ✓ Last harvestable bolls are about 40 days old.
- ✓ Root-zone moisture is adequate to finish.
- ✓ Plants recover from afternoon wilt by morning.
- ✓ Boll opening and NAWF support termination.
- ✓ Forecast and irrigation method support cutoff.

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

SOIL-WATER HOLDING GUIDE

Soil	Available water (in/ft)	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, measured field conditions and irrigation system.

Weather: Iowa Environmental Mesonet ASOS/AWOS, Aug. 29-Sept. 4, 2026 - KSAD, KFAT, KELP, KLBB and KDMN; NOAA/NCEI validation framework. Field context: New Mexico Pima Growers update; Kerry Siders, Ph.D., Texas A&M; AgriLife Extension. ET method: standardized planning scenario; use local reference ET for field scheduling.

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 SEPTEMBER 4, 2026

Executive Weather Summary

Temperatures moderated from the prior week but remained hot enough to sustain late-season crop-water demand. Weekly highs reached 105 F at Safford, 101 F at Lubbock and 100 F at Deming and El Paso; Fresno cooled sharply after Aug. 31.

Rain remained limited. Safford recorded 0.14 inch and Deming 0.11 inch; Fresno and Lubbock were dry, while El Paso received only trace amounts. All five stations remain below their 1991-2020 year-to-date precipitation normals.

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

REGIONAL WEATHER RISK



Primary Risk: Heat + Moisture Deficit

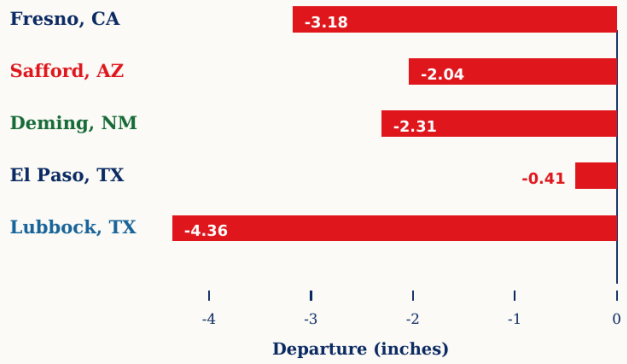
Largest YTD Deficit: Lubbock -4.36 in

REGIONAL WEATHER & CROP MATRIX

Location	7-day high / low F	7-day rain / effective rain (in)	2026 YTD / departure (in)	Weekly DD60 gain	Crop stage	Net crop-water requirement (in)
Fresno, CA	83-97 / 58-69	0.00 / 0.00	4.54 / -3.18	**+99**	Advanced open boll	2.10
Safford, AZ	86-105 / 62-77	0.14 / 0.12	3.11 / -2.04	**+128**	Open boll	1.98
Deming, NM	90-100 / 67-74	0.11 / 0.09	4.08 / -2.31	**+128**	First open boll	2.01
El Paso, TX	92-100 / 72-78	Trace / 0.00	5.43 / -0.41	**+143**	Open boll	2.10
Lubbock, TX	95-101 / 69-76	0.00 / 0.00	8.66 / -4.36	**+138**	Open boll	2.10

Daily summaries use local station days. Effective rain = 85% of observed. Modified DD60 uses a 60 F base and 86 F cap. Net crop-water requirement uses 0.30 in/day open-boll ETc less effective rain; confirm measured field moisture.

YTD PRECIPITATION DEPARTURE



DROUGHT & CLIMATE OUTLOOK

The U.S. Drought Monitor valid Sept. 1 shows drought expanding nationally, with additional South-Central degradation and continued atmospheric demand across dry areas.

Station context: Fresno remains 3.18 inches below normal. Limited rain improved Safford and Deming only modestly; El Paso is 0.41 inch below normal, and Lubbock carries the largest monitored deficit at 4.36 inches.

NOAA's Sept. 4 outlook favors above-normal temperatures for much of the country in weeks 3-4, with the strongest probabilities including southern California and the south-central U.S. This is risk context, not an irrigation schedule.

CALIFORNIA - COOLER, DRY

Fresno cooled during the week but received no rain; YTD deficit remains 3.18 inches.

SOUTHWEST - LIMITED RELIEF

Safford received 0.14 inch and Deming 0.11 inch; both remain well below normal.

WEST TEXAS - PRIMARY DEFICIT

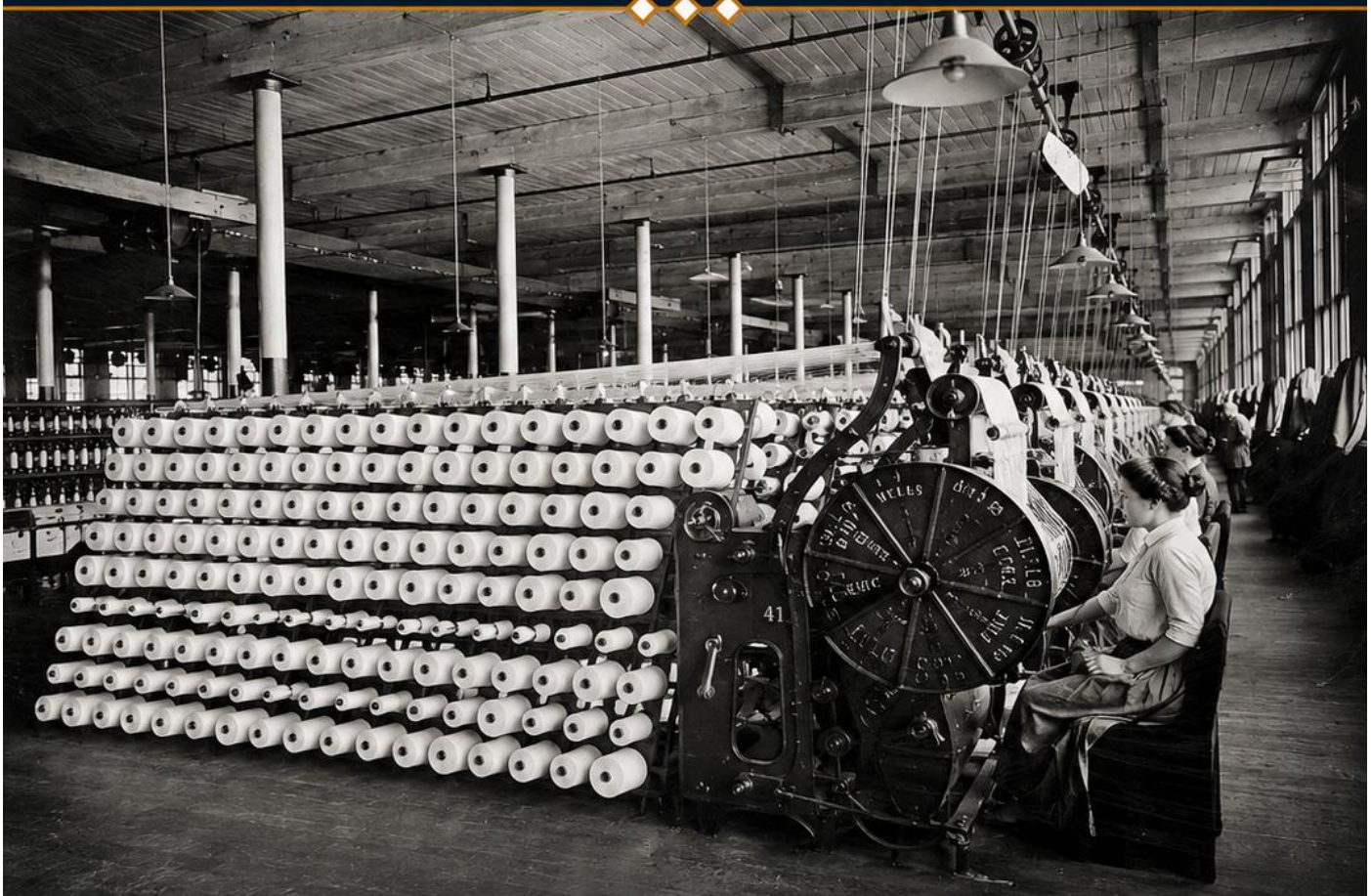
Lubbock was dry, reached 101 F and now stands 4.36 inches below normal.

Weather: Iowa Environmental Mesonet ASOS/AWOS daily summaries, Aug. 29-Sept. 4, 2026 - KSAD, KFAT, KELP, KLBB and KDMN. Normals: NOAA/NCEI 1991-2020 Daily Climate Normals. Drought: U.S. Drought Monitor, valid Sept. 1, 2026. Outlook: NOAA CPC, issued Sept. 4, 2026.

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NEW MEXICO UPDATE

WEEK ENDING 9-4-26






NEW MEXICO FIELD SUMMARY

NEW MEXICO | SEPTEMBER 4, 2026

The New Mexico Pima crop continues to progress in good condition, with plants averaging 27-30 total nodes and reaching first open boll. Growers have been able to keep pace with crop-water demand, and both boll fill and boll retention remain on target.

Final irrigations are underway in furrow-irrigated fields, while drip irrigation will continue until closer to defoliation.

WEST TEXAS FIELD REPORT

Crop Development, Pest Activity and Irrigation Outlook

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

WEEK ENDING SEPTEMBER 4, 2026



CURRENT CROP & PEST SITUATION

Update by Kerry Siders, Ph.D. - Texas A&M AgriLife Extension | September 4, 2026

IRRIGATION DECISION

Normally at this time, the question is, "When do I shut the irrigation water off?" This year, it has been more of a statement: "I know I should probably keep watering, but...."

The last bolls growers intend to harvest and count toward yield must be approximately 40 days old before the plant undergoes significant moisture stress - stress from which it cannot fully recover by the following morning.

A boll set on August 10 will be 40 days old on September 19. Until then, plants may wilt during the heat of the day, but they should fully recover by the next morning. If they do not, boll weight and fiber quality will suffer.

Where irrigation cannot continue, growers should understand the likely effects on late boll weight and quality.

PEST STATUS

Fortunately, insect pests have mostly run their course for the season. Cotton aphids declined in most fields this week, and beneficial insects are moving back in to help.

Low numbers of Lygus and stinkbugs can still be found, but observed boll damage is less than 1%.

CROP MATURITY

Cracked and open bolls are becoming more common. Effective harvest-aid performance will now be important as fields move toward termination.

LATE-SEASON WATCH

40-DAY BOLL RULE

Protect the youngest harvestable bolls from significant moisture stress until they are about 40 days old.

SEPTEMBER 19 TARGET

For bolls set August 10, maintain recoverable plant water status through approximately September 19.

SCOUT TO THE END

Continue checking for aphids, Lygus and stinkbugs, although pressure and boll damage are now low.

HARVEST APPROACHING

Cracked and open bolls are increasing. Prepare for timely and effective harvest-aid applications.

PIMA GROWERS INTERPRETATION

The West Texas crop is moving into open-boll and harvest-aid timing. Irrigation termination should be based on the age of the youngest boll expected to contribute to yield, the plant's overnight recovery and available soil moisture - not on a fixed calendar date.

Management priority: protect late harvestable bolls through their 40-day development window while continuing low-intensity pest scouting and preparing for harvest aids.

Source: Texas A&M AgriLife Extension - Kerry Siders, Ph.D. | September 4, 2026

Edited for clarity and space; agronomic meaning preserved.

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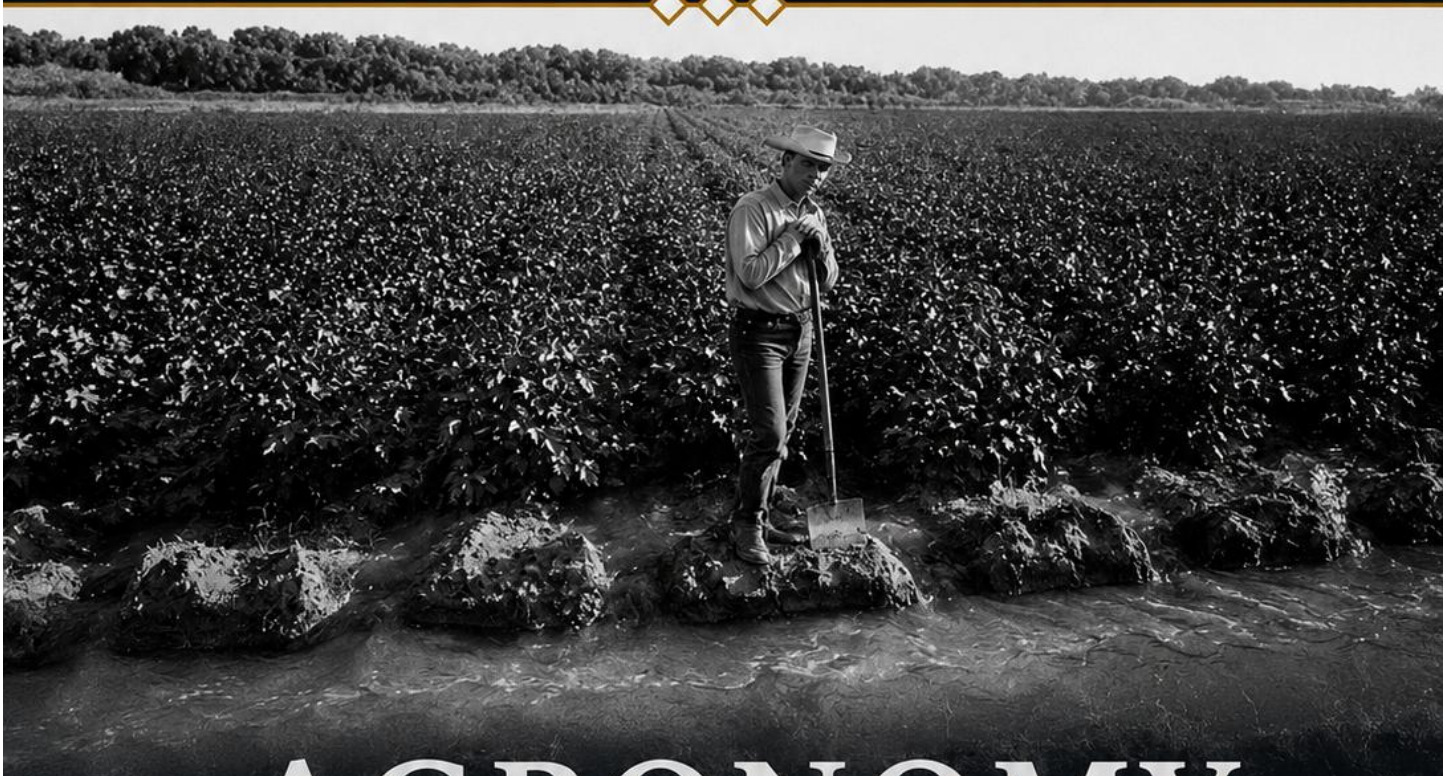
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PIMA FACTS

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What Is Extra-Long Staple (ELS) Cotton?

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



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

USDA DEFINITION

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

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

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

WHY IT MATTERS

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

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

AMERICAN PIMA COTTON • THE WORLD'S FINEST COTTON

Source: USDA Cotton Program Definitions

GOWAN COTTON COMPANY

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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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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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COTTON PHYSIOLOGY

Heat Stress vs. Water Stress in Cotton

Different Causes, Overlapping Consequences

The central distinction: Water stress limits the plant's ability to grow and support its boll load. Heat stress can directly disrupt flowering, fertilization and young-boll survival - even where soil moisture is adequate.

Cotton can survive high temperature and water shortages after yield and quality have already been reduced. Survival is not the same as producing and retaining a high-yielding crop of mature, premium-quality lint.

Across the American Pima belt, high temperature raises crop water demand. If irrigation cannot keep pace, stomata close and the canopy loses evaporative cooling. Water stress can intensify heat stress - but the two are not physiologically identical.



THE FUNDAMENTAL DIFFERENCE

PLANT RESPONSE	WATER STRESS	HEAT STRESS
Primary trigger	Water supply to the roots cannot meet atmospheric and crop demand.	Plant or reproductive-tissue temperature exceeds physiological tolerance.
First response	Stomata close; transpiration, carbon-dioxide uptake and cell expansion decline.	Respiration and oxidative stress increase; membranes, enzymes and reproductive processes are impaired.
Can irrigation help?	Usually, if applied before irreversible injury and roots remain functional.	It can improve evaporative cooling, but cannot fully prevent direct temperature injury.
Typical crop effect	Reduced canopy growth, earlier cutout, fruit shed and restricted boll filling.	Poor pollination or fertilization, fruit loss, delayed compensation and shortened boll filling.

WATER STRESS: THE PLANT SHIFTS INTO CONSERVATION MODE

As the soil dries, declining plant water potential reduces the turgor required for cell expansion. Leaves become smaller, main-stem and fruiting-branch growth slow, and developing fruit receives fewer carbohydrates. Stomatal closure conserves water, but it also restricts carbon dioxide entry and reduces photosynthesis. With less carbohydrate available, the plant begins shedding fruit it cannot support.

Early vegetative stress can reduce canopy size and the number of fruiting sites. Cotton may compensate when conditions improve, but compensation shifts production toward later positions. In West Texas or in a Southwest crop approaching early cutout, those later bolls may not have enough remaining heat units to mature fully.

The most consequential period is first bloom through peak bloom, when crop water use and boll demand rise together. Stress can accelerate the decline in nodes above white flower, increase square and young-boll shed, reduce boll size and force premature cutout. Bolls are especially vulnerable during roughly the first week after flowering.

HEAT STRESS: REPRODUCTION CAN FAIL BEFORE THE PLANT WILTS

A cotton crop can experience heat stress even when the root zone contains adequate moisture. Excessive temperature increases maintenance respiration, destabilizes membranes and proteins, and creates reactive oxygen compounds that damage cells. Photosynthesis declines at the same time that the plant consumes more stored carbohydrate simply to maintain itself.

Flowers and newly fertilized bolls are especially sensitive. High temperature can reduce pollen viability and germination, restrict pollen-tube growth and interfere with fertilization. A flower may appear normal on the day it opens but fail to retain a boll several days later. Warm nights compound the problem by increasing respiration and limiting the crop's opportunity to rebuild carbohydrate reserves.

University of Arizona's canopy-based model classifies mean daily canopy temperatures below 82.4°F as no stress, 82.4-86°F as Level 1 stress and above 86°F as Level 2 stress. Humidity matters: a well-watered crop can sometimes remain cooler through transpiration under dry air, but humid conditions restrict evaporative cooling and keep reproductive tissues warm.

FROM FLOWER TO FIBER: WHERE EACH STRESS ACTS

STAGE	PRIMARY PROCESS	WATER-STRESS PATHWAY	HEAT-STRESS PATHWAY
FLOWERING	Pollination and fertilization	Carbohydrate shortage increases shed	Pollen and ovary injury can prevent set
EARLY BOLL	Retention and cell division	Low plant water status limits support	Young reproductive tissue remains sensitive
ELONGATION	Rapid fiber cell expansion	Low turgor can shorten staple	Disrupted metabolism can reduce length
WALL BUILD	Cellulose deposition	Severe stress reduces maturity	High respiration shortens filling

BOLL NUMBER, BOLL SIZE AND MATURITY

Yield and quality effects depend on crop stage, boll age, stress severity and duration. Stress during flowering primarily reduces boll number. Stress after boll set increasingly affects boll size and the fiber developing inside it. Fruit loss from either stress can stimulate compensatory flowering; that recovery is useful only where sufficient season remains to mature the later bolls.

WHY MICRONAIRE DOES NOT TELL THE WHOLE STORY

Boll retention is often more sensitive to water stress than fiber thickening. Under moderate stress, the plant may shed young fruit while continuing to supply carbohydrates to fewer surviving bolls. Yield falls, but those bolls may still develop normal or elevated micronaire. High micronaire therefore does not prove that a field escaped stress.

More severe or prolonged stress during boll filling can reduce cellulose deposition and produce immature fiber, lower micronaire, reduced strength and greater variability. Repeated cycles of stress, fruit loss, recovery and compensatory flowering also create bolls of widely different ages, reducing crop-level maturity and uniformity.

FIBER QUALITY EXPOSURE

QUALITY TRAIT	PRIMARY VULNERABILITY	FIELD INTERPRETATION
Staple length	Water deficit during elongation; extreme heat disrupting cell expansion.	Shorter fibers can result even when surviving bolls appear externally normal.
Micronaire / maturity	Incomplete cellulose deposition during severe or prolonged boll-filling stress.	Moderate stress may reduce yield yet leave normal or high micronaire in surviving bolls.
Strength / uniformity	Interrupted development and mixed boll ages after stress-and-recovery cycles.	Crop averages may hide greater bale-to-bale or within-sample variability.

THE PIMA INTERPRETATION

American Pima and Upland cotton share the same fundamental stress responses. Available research does not support a universal claim that every Pima variety is inherently more or less heat- or drought-tolerant than Upland; tolerance varies with cultivar, environment and crop stage.

The more defensible distinction is Pima's greater quality exposure. Pima has a longer boll-development period and derives its market value from exceptional staple length, strength, fineness and uniformity. That extends the period during which developing bolls require adequate water and favorable temperature. Stress that produces a modest quality change in an Upland crop may have greater economic consequences when it compromises the extra-long-staple profile expected from Pima.

FIELD DIAGNOSIS: WHICH STRESS IS DOMINANT?

Air temperature alone is not enough. Diagnosis should combine soil-moisture status and irrigation timing with canopy temperature, relative humidity, nighttime minimum temperature, nodes above white flower, fruit retention by cohort and the timing of stress relative to flowering and boll age.

WATER STRESS IS MORE LIKELY WHEN...	DIRECT HEAT STRESS IS MORE LIKELY WHEN...
The canopy cools, plant growth recovers and fruit retention stabilizes after irrigation. Wilting, reduced leaf expansion and an accelerated move toward cutout accompany declining soil moisture.	Soil moisture is adequate but fruit retention deteriorates after prolonged hot days, warm nights or humid periods. The crop may remain visually vigorous even while reproductive efficiency declines.

THE MANAGEMENT TAKEAWAY

Maintaining adequate water does more than prevent wilting. It supports stomatal function, photosynthesis and evaporative cooling, reducing both water stress and part of the canopy-temperature burden. It cannot eliminate all heat injury. When flowering cotton encounters prolonged daytime heat, elevated nighttime temperature or humidity that restricts cooling, pollination and boll retention may decline even in a properly irrigated field.

For Pima growers, the objective is not simply to keep the plant alive or carry green bolls. It is to maintain sufficient physiological activity from flowering through full-sized green boll to complete fiber elongation and secondary-wall deposition. The greatest losses occur when exceptional heat raises crop demand beyond irrigation capacity: water stress reduces the plant's ability to support fruit while heat directly reduces reproductive efficiency and shortens the effective boll-filling period.

Water stress limits capacity. Heat stress disrupts function. Together, they reduce both the amount of lint harvested and the quality built into each surviving fiber.

CONNECTION TO THE 2026 MONSOON FEATURE

The 2026 regional analysis found the greatest yield risk where exceptional heat and insufficient water capacity overlapped. Adequately irrigated fields avoided the most damaging water-stress effects, although prolonged daytime heat and warm nights may still have reduced reproductive efficiency and boll-filling duration.

FIELD EXPRESSIONS OF STRESS



REPRODUCTIVE LOSS

Shed squares and flowers indicate lost yield potential. The symptom can result from water stress, heat injury or their combined effects.



CANOPY WATER STRESS

Midday leaf droop indicates declining plant water status when crop demand exceeds available moisture. Confirm with soil moisture and canopy temperature.

RELATED WEATHER FEATURE The 2026 Southwest Monsoon: Underperforming Moisture, Exceptional Heat and Uneven Crop Risk.

TECHNICAL SOURCES

University of Arizona Cooperative Extension and AZMET, Cotton Heat Stress Model and Cotton Advisory guidance. • Oosterhuis et al., Stress Physiology in Cotton, The Cotton Foundation. • National Cotton Council, Producing for Quality: Cotton Physiology Today. • University of California ANR. • Journal of Cotton Science.

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SILVERLEAF WHITEFLY ADULTS AND IMMATURE STAGES ON THE UNDERSIDE OF A COTTON LEAF

WHITEFLY MANAGEMENT IN COTTON

SCOUT EARLY. TREAT ON THRESHOLD. PROTECT OPEN PIMA LINT.

WHY PIMA REQUIRES EXTRA ATTENTION

Silverleaf whitefly (Bemisia tabaci) is a phloem-feeding pest that removes plant sap, weakens the canopy, and excretes sugar-rich honeydew. Heavy populations can cause premature leaf decline, reduced boll filling, yield loss, and delayed or uneven crop termination.

UC guidance notes that Pima varieties are generally more attractive to sweetpotato/silverleaf whitefly than upland cotton. Pima also remains green longer, extending the period when adults and nymphs can build. Once bolls open, honeydew can contaminate exposed lint and support sooty mold.

THE QUALITY RISK

Sticky or discolored lint can be harder to harvest and gin, increase trash, disrupt carding and spinning, reduce yarn and fabric quality, and expose premium Pima cotton to discounts or rejection.

FIELD SCOUTING: 30-LEAF METHOD

1. **Sample correctly.** Walk the management unit and collect 30 leaves. Use the 5th mainstem leaf below the terminal; check the underside.
2. **Score adults.** A leaf is adult-infested when 3 or more adults are present. Record presence or absence.
3. **Score nymphs.** Within a quarter-sized disk between major veins, record the presence of at least 1 live large nymph (3rd or 4th instar).
4. **Intensify monitoring.** Scout at least weekly and twice weekly when nearby melons, vegetables, weeds, or cotton are drying down and adults may migrate.
5. **Check margins first.** Populations often begin at edges. Compare edges with the interior; targeted edge treatment may be appropriate when migration is localized.

CORE ACTION THRESHOLD

Treat at about 40% adult-infested leaves AND/OR 40% nymph-infested disks. For an IGR, confirm live nymphs are present.

WHITEFLY TREATMENT DECISION: MATCH THE PRODUCT TO THE POPULATION

ADULTS PRESENT NYMPHS BELOW THRESHOLD	ADULTS + LIVE NYMPHS AT THRESHOLD	OPEN BOLLS + HEAVY ADULT PRESSURE
Re-sample soon. If migration is concentrated at field edges, consider an edge treatment with a selective, adult-active non-IGR.	Use a selective IGR while the population is still manageable. Allow time for slow-acting products to work; preserve natural enemies.	Prioritize lint protection and faster knockdown. Reserve broad-spectrum chemistry for true late-season need and observe PHI.

AFTER ANY APPLICATION: re-sample the field, evaluate live nymphs as well as adults, verify coverage, and rotate to a different IRAC group if retreatment is justified.



HONEYDEW AND SOOTY MOLD CAN CONTAMINATE OPEN LINT AND THREATEN PIMA QUALITY

TREATMENT GUIDELINES & CHEMICAL OPTIONS

RATES SHOWN ARE EXTENSION-GUIDE RANGES; THE CURRENT PRODUCT LABEL GOVERNS

Active ingredient (example)	IRAC	Extension rate/acre	Best fit
Buprofezin (Courier SC)	16	9-12.5 fl oz*	Selective IGR; nymphs; early, timely threshold spray
Pyriproxyfen (Knack)	7C	8-10 fl oz	Eggs/large nymphs; slow, long residual; once/season
Spiromesifen (Oberon 2SC)	23	6 fl oz early; 8-16 fl oz mid-late	Eggs/nymphs; selective; thorough coverage
Acetamiprid (Assail 70WP)	4A	1.7-2.3 oz	Adults plus immatures; faster option when timing is late
Afidopyropen (Sefina)	9D	14 fl oz	Selective mid/late-season adult suppression
Flupyradifurone (Sivanto 200 SL)	4D	10.5-14 fl oz	Adults and immatures; migration or established pressure
Dinotefuran (Venom)	4A	1-3 oz	Faster adult/immature activity; protect pollinators/beneficials
Bifenthrin (2EC example)	3A	2.6-6.4 fl oz	Late open-boll knockdown only; disruptive to beneficials

*Courier rate reflects UGA cotton guidance; UC lists label rates. Formulations and state registrations differ. Verify current local label, PHI, REI, seasonal maximums, and restrictions before use.

HOW TO SELECT THE TREATMENT

- **Timely population:** Start with a selective IGR when adults are moderate and live nymphs confirm reproduction. Expect a slow visible response.
- **Heavy adult migration:** Use a faster non-IGR adult-active product. Re-sample; follow with an IGR only if nymphs establish and the label allows.
- **Open-boll period:** Protect exposed lint. Reserve pyrethroid knockdown for late need; broad-spectrum sprays may flare mites or aphids.
- **Resistance management:** Rotate IRAC groups and avoid consecutive uses from the same group. Count all in-season insecticide uses.

INTEGRATED MANAGEMENT PRIORITIES

- **Preserve beneficials.** Avoid unnecessary broad-spectrum insecticides. Predators and parasitoids extend control.
- **Manage sources.** Destroy residues, control weeds and regrowth, and coordinate with nearby hosts as melons and vegetables senesce.
- **Get coverage.** Reach leaf undersides with sufficient carrier volume and canopy penetration; ground rigs often improve coverage.
- **Finish decisively.** Timely defoliation, harvest, and stalk destruction reduce honeydew exposure and carryover.

SOURCES

UC Statewide IPM Program, Silverleaf Whitefly in Cotton (treatment table updated Aug. 2024); University of Arizona Cooperative Extension, Whitefly Management in Arizona Cotton; University of Georgia Extension, Scouting and Managing Silverleaf Whitefly in Cotton and 2026 field updates; Texas A&M AgriLife Extension, Managing Cotton Insects in Texas; National Cotton Council Beltwide proceedings on whitefly honeydew and sticky cotton.

Educational guidance only. Always follow the current federal and state label and consult local Extension or a licensed crop adviser.



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.

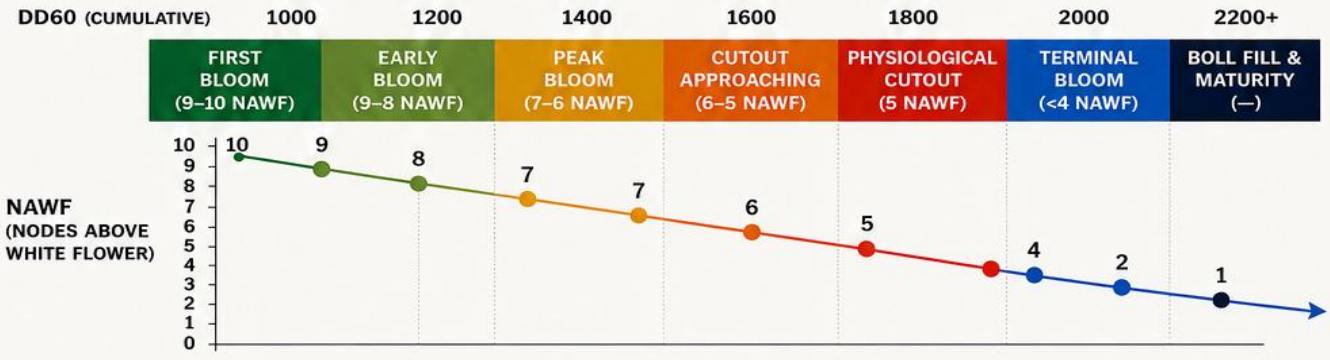
> **"DD60 measures the season. NAWF measures the crop."**

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

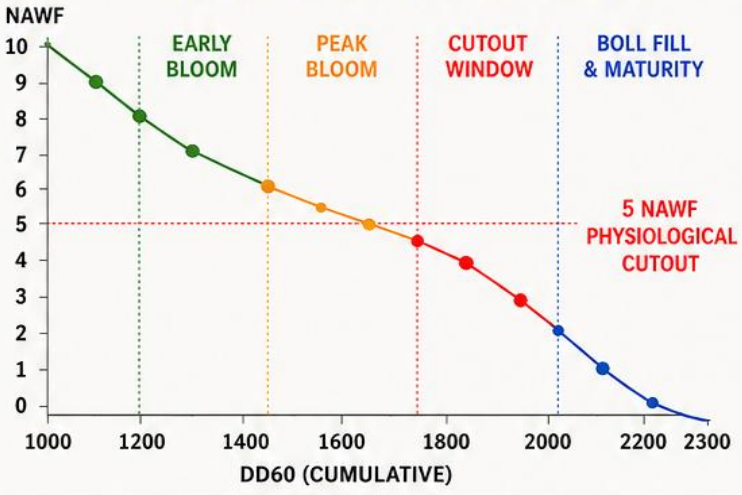


DD60 / NAWF BENCHMARK GUIDE

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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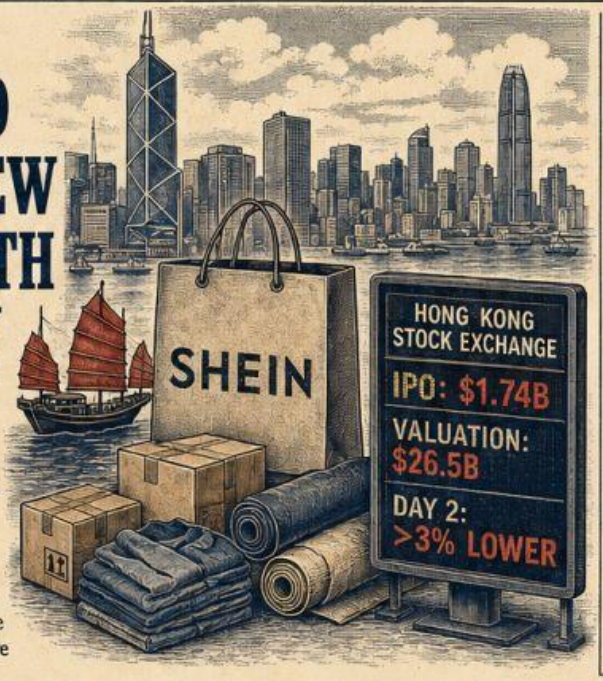
Mid-Week Market Brief

★ NEWS AND INSIGHT FOR THE TEXTILES & APPAREL TRADE ★

WEDNESDAY, SEPTEMBER 2, 2026 VOL. I • NO. 15

★ LEAD STORY ★

SHEIN'S IPO PUTS THE NEW APPAREL MATH ON DISPLAY



Shein finally reached the Hong Kong market, but at a fraction of its former valuation. The fast-fashion company raised about $1.74 billion at a valuation near $26.5 billion. Shares finished roughly flat on their first day after falling sharply early in the session, then slipped more than 3% on the second day. Tariffs, the loss of low-value duty exemptions and regulatory pressure have changed the economics that powered Shein's rise.

THE WEEK'S READ

Shein's Hong Kong debut disappoints.

★

France starts fast-fashion environmental fees.

★

Gap raises profit outlook; Old Navy struggles.

★

July CPI: 3.4%; apparel: 3.9%.

★

July retail sales fall 0.6%.

$1.74B	$26.5B	3.4%	3.9%	-0.6%	10%
SHEIN IPO	VALUATION	U.S. CPI	APPAREL CPI	RETAIL M/M	GAP COMPS
Raised in Hong Kong offering.	Far below Shein's 2022 peak.	July year-over-year inflation.	July year-over-year apparel inflation.	July total U.S. retail sales.	Gap brand quarterly comparable-sales growth.

★ FIVE STORIES TO WATCH ★

01 SHEIN

The long-awaited Hong Kong IPO raised about $1.74B and valued Shein near $26.5B. The first trading sessions showed investor caution.



02 FAST FASHION

France has begun environmental fees on ultra-fast fashion, ranging from €0.25 on small items to as much as €12 on coats.



03 GAP

Gap raised its annual profit forecast. Gap brand comparable sales rose 10%, while Old Navy fell 4% and Athleta dropped 12%.



04 INFLATION

July headline CPI was 3.4% year over year. Apparel prices rose 3.9%, still running above the broader index.



05 RETAIL

July U.S. retail and food-service sales fell 0.6% from June but remained 5.0% above July 2025.



★ BOTTOM LINE ★



This week's news shows how quickly the economics of apparel are changing. Trade rules, environmental fees and inflation are pressing on cost while consumers remain selective. Brand strength still matters, but the room for mistakes is getting smaller.

★ BOB'S TAKE ★

Shein may be the clearest example of what has changed. The model that once looked almost unbeatable now has to absorb tariffs, regulation and higher fulfillment costs. Cheap and fast still matter. They just aren't enough by themselves anymore.



Sources: Reuters • BLS • U.S. Census • Data through Sept. 2, 2026



The Cotton-for-Quota Plan Has Split the U.S. Industry

Robert Antoshak

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

September 5, 2026

Washington's offer reads simple enough on paper. Foreign factories that buy American cotton or American textile inputs get to ship a set volume of apparel into the United States without paying the new Section 301 tariff.

Four countries qualify: Bangladesh, Cambodia, Indonesia, Malaysia. Each gets a quota sized to what it buys from U.S. suppliers, running three years to start. Volumes and operating rules aren't public yet. Goods entering under quota still owe the normal duty on the product, they're just skipping the 301 add-on. **USTR's final notice** sets the frame and leaves the rest to be worked out later.

Look at what sizes the quota. A shopping list. Origin rules have nothing to do with it and neither does fiber content, which puts the arrangement outside anything we've worked under since NAFTA. The industry has been arguing about it since the day it was announced. The administration’s policy establishes Tariff Rate Quotas, but it also has been a lightning rod for criticism and angst throughout the trade.

Cotton's Gain

Cotton growers didn't need anyone to explain what this does for them. The government's trading access to the American consumer for demand for American fiber. If specifying U.S. cotton helps a factory outside Dhaka get its shirts in under a lower duty, that factory has a reason to specify U.S. cotton.

The timing's part of the enthusiasm. Brazil has been taking export share for several seasons with cheaper logistics and a growing customer list across Asia. Growers here have watched prices sit in a range that barely clears the loan rate, with carryover heavy enough to kill any rally before it gets going. A policy that steers buyers toward American bales is worth something with prices sitting there.

The domestic mill base stopped being the main outlet a long time ago, and most of the crop leaves the country now. When your demand lives overseas, anything that makes overseas buyers prefer your fiber counts as a customer. Growers have been short of those.

Downstream, Nobody's Cheering

Mills read the same page and see something else entirely.

NCTO has come out hard against putting raw cotton in the program. The worry's that we'll ship more bales overseas while spinning, knitting, weaving and cut-and-sew keep drifting further from here. We'd be exporting the fiber and importing the garment it became, then calling that a win for domestic manufacturing.

Try selling that to a yarn spinner in the Carolinas.

They argue the mechanism hands a small set of Asian suppliers an edge over both U.S. producers and the hemisphere. Roughly 70 percent of U.S. textile and apparel exports go to Western Hemisphere partners, and those regional chains buy American yarn and fabric, not just bales. **NCTO also reports** that Asia's share of the U.S. import market climbed from 77 percent in 2019 to 79 percent while the hemisphere slid from 16 to 12.

A bale sold to Vietnam is one transaction. A pound of yarn sold to a knitter in Honduras carries the spinner, the power bill, the maintenance crew and the payroll behind all of it, and the fabric comes back through a port here inside a finished garment. The value stacks up in a way raw fiber never does.

Selling more cotton is fine. What bothers people is the rest of it, a structure that rewards a supply chain doing nearly all of its value-added work somewhere else.

Where the Forced Labor Case Falls Apart

Then there's the awkward part. These 301 duties went on because the administration says the countries in question haven't done enough about forced-labor goods. Buying a bale of American cotton tells you nothing about the rest of what's moving through that factory.

Cotton happens to be the worst possible commodity for this kind of bookkeeping. Bales get blended at the opening line, and once fiber from four origins goes into the same lay-down, the yarn coming off the other end has no paper trail worth the name. That's why UFLPA enforcement leaned on isotopic and DNA testing instead of invoices. An invoice proves somebody bought cotton. It says nothing about what ended up in the shirt.

Which means a mill can run U.S. fiber on one line, earn its credit, and keep sourcing other yarn and fabric through channels nobody can see into. Without tracing and enforcement behind it, the quota turns into a purchasing scheme wearing a human rights label.

The Proposal That Lost

Brands and retailers had their own reasons to fight another round of tariffs, mostly that the cost eventually lands on a price tag. Before the final action, AAFA, USFIA and the textile groups floated something else: let companies earn tariff credits by buying U.S. textiles and qualifying apparel from Western Hemisphere partners.

CAFTA-DR and USMCA already run on yarn-forward rules, so the regional benefit sits inside the origin test before anyone applies for anything. Credits earned against those rules would've reached spinners here and cutting rooms in San Pedro Sula at the same time, and customs already knows how to police them.

The administration went with country quotas for four Asian suppliers instead. Qualifying USMCA and CAFTA-DR goods did get carved out of the new duties. That carve-out's real relief and nobody should wave it off. It also just sits there. An incentive pulls business toward those factories.

The industry ends up split. Growers pick up an export incentive. Some importers may see relief from the extra duty down the road. Spinners and weavers here could wind up competing against Asian garments built out of their own raw material, and factories in Mexico, Central America and the Caribbean get to compete with imports whose tariff break came from a procurement decision rather than from making anything nearby.

Details Nobody Has Seen

Everything depends on rules nobody's written yet. How does a quota get calculated? Does buying yarn or fabric earn more access than buying bales? Who holds the rights, the foreign government, the manufacturer, the exporter, the U.S. importer and can those rights be traded or transferred? And what stops transshipment, or the quiet mixing of inputs nobody verified?

Anyone who worked through the Multifiber Arrangement knows where that last set of questions leads. Quota was an asset. It'd get allocated, brokered, hoarded and priced, and in Hong Kong the quota cost more than the labor going into the garment. Whoever holds these rights collects the spread between the 301 rate and zero, and that spread's worth serious money on volume. Design the allocation badly and you've handed somebody a windfall for holding paper.

Paperwork questions, every one of them. They also decide whether this supports the whole chain or just moves cotton one direction and garments the other.

So What’s It For?

If the point's backing American industry, the incentive ought to follow American work. Cotton deserves support. So do the mills turning that fiber into yarn and cloth, along with the hemisphere factories buying it, because proximity and scale are what keep those chains running at all.

The fix is arithmetic, if anyone wants it. Weight the thing. Let a dollar of U.S. fabric earn more quota than a dollar of yarn, and a dollar of yarn earn more than a dollar of raw fiber, with the schedule published so buyers can plan against it. Give the hemisphere a lane of its own. None of it takes a new statute. It takes a decision about which part of the chain the government wants to keep alive.

Washington built itself a real instrument here and so far, it's aimed at cotton sales. A manufacturing policy would look different.

SPECIAL POLICY ANALYSIS

COTTON-FOR-QUOTA

What the New Trade Mechanism Could Mean for American Pima

SEPTEMBER 5, 2026

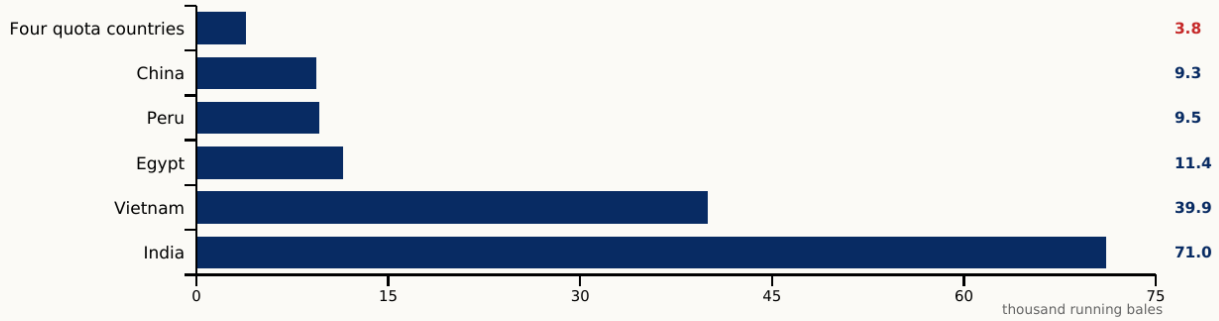
THE PIMA GROWERS VIEW: Additional demand for U.S. cotton is welcome. But a durable policy should increase and stabilize both fiber demand and value-added manufacturing. The present buyer map suggests the direct Pima benefit is limited unless the final quota rules deliberately recognize premium fiber, U.S. yarn and fabric, and Western Hemisphere production.

A Real Incentive - but a Poor Initial Match for Pima

The new Section 301 framework directs the U.S. Trade Representative to establish three-year tariff-rate quotas for Bangladesh, Cambodia, Indonesia and Malaysia. Textile and apparel imports within those quotas may avoid the new 10% Section 301 surcharge, with access tied to each country's purchases of U.S. cotton. Normal product duties still apply. The operating rules, quota volumes and allocation method remain to be established.

For cotton producers, the logic is direct: access to the U.S. consumer market becomes more valuable when a foreign supplier purchases American cotton. That can defend U.S. export share and create incremental demand at a time when price stability matters.

2026/27 U.S. Pima commitments by destination



USDA commitments as of Aug. 27, 2026. The four-country bar combines Bangladesh, Cambodia, Indonesia and Malaysia. Totals may reflect rounding.

The Pima buyer map tells a more cautious story

Current 2026/27 U.S. Pima commitments total 170.1 thousand running bales. India, Vietnam, Egypt, Peru and China account for 141.1 thousand bales - approximately 83% of the book. None is among the four quota beneficiaries. By contrast, the four eligible countries together account for only about 3.8 thousand bales, or 2.2% of current Pima commitments.

Bottom line: The program may strengthen demand for U.S. cotton overall, but the initial direct connection to today's Pima customer base is small.

WHO BENEFITS - AND WHO CURRENTLY BUYS PIMA?

The distinction between aggregate cotton demand and Pima demand is decisive

Quota beneficiary	Pima commitments	Share of Pima book	Upland commitments	Pima relevance today
Bangladesh	3.0	1.8%	142.7	Small but established
Indonesia	0.5	0.3%	213.9	Minimal
Malaysia	0.3	0.2%	139.1	Minimal
Cambodia	0.0	0.0%	0.9	None reported
Combined	3.8	2.2%	496.6	Upland-led opportunity

Thousand running bales; USDA commitments as of Aug. 27, 2026. Pima share uses the 170.1 thousand-bale total. Upland data are included to show which fiber class presently drives the four-country opportunity.

Why the Direct Pima Effect Is Modest

Pima is a specialized extra-long-staple fiber, not a generic substitute for Upland. Demand is created by mills and brands making finer yarns and premium products. A quota based only on total pounds or bales of U.S. cotton would naturally favor the larger, lower-cost Upland trade.

If quota access is based on purchase value, fiber quality, or verified use in qualifying goods, Pima could carry more influence. If all bales receive equal credit, the mechanism offers little reason to shift a factory's premium-fiber program toward American Pima.

The final rules therefore matter more than the announcement. The design will determine whether Pima receives a meaningful demand signal or only an indirect benefit from a stronger overall U.S. cotton position.

The Western Hemisphere Is Already Material

Western Hemisphere destinations account for 18.1 thousand bales, or about 10.6% of current Pima commitments. Peru leads the regional book at 9.5 thousand bales, followed by Colombia at 6.8 and Costa Rica at 1.7.

That regional demand is strategically different. When U.S. fiber or yarn moves into a nearby spinning, knitting or cut-and-sew chain, more of the value can remain connected to U.S. mills, ports, logistics and free-trade partners.

Pima Growers supports expansion in both directions: competitive export markets for raw Pima and a larger Western Hemisphere manufacturing base. The objective should not be to choose fiber exports over manufacturing. It should be to make American Pima more valuable through every stage of the chain.

Net assessment: Near-term Pima demand benefit: limited. Potential longer-term benefit: meaningful if quota rules reward Pima, U.S. textiles and verified regional production.

A GROWTH POLICY FOR THE WHOLE PIMA CHAIN

Demand should rise with value creation - not stop at the bale

The Pima Growers Policy Test - in Plain Language

A successful policy should do more than create a short-term purchase of American cotton. It should build repeat demand, protect Pima's premium value and encourage more manufacturing in the United States and the Western Hemisphere.

1	**WHAT THE CURRENT PLAN REWARDS**	Foreign factories can earn quota access that avoids the Section 301 surcharge by purchasing U.S. cotton. That can create new demand for American bales.
2	**WHERE IT FALLS SHORT FOR PIMA**	Most cotton bought by the four eligible countries is Upland. Together, those countries represent only 2.2% of the current U.S. Pima order book. A simple bale count may therefore create little reason to buy premium Pima.
3	**WHAT PIMA GROWERS RECOMMENDS**	Keep a basic reward for U.S. cotton, then provide greater credit when the purchase supports verified American Pima, U.S.-made yarn or fabric, and finished goods manufactured in the Western Hemisphere.

Follow the Value Added

BASE REWARD	MORE REWARD	STRONGEST REWARD
U.S. raw cotton	**Verified American Pima or U.S.-made yarn**	**U.S. fabric used in Western Hemisphere apparel**
Supports growers	Supports premium fiber and domestic mills	Supports the largest share of regional jobs and investment

This is Pima Growers' recommended policy direction, not the current official quota formula.

Three Results We Want

- More reliable demand: reward repeat purchasing and verified use, not a one-time order made only to obtain quota.
- Better grower value: recognize that American Pima is a premium fiber serving specialized markets, not simply another bale in the total.
- More regional manufacturing: give brands and factories a positive reason to use U.S. yarn and fabric in Western Hemisphere supply chains.

PIMA GROWERS CONCLUSION

Cotton-for-quota can be a useful demand instrument, but its present geography is not aligned with the core American Pima customer base. The strongest policy would preserve the raw-cotton incentive while assigning greater value to verified American Pima, U.S. yarn and fabric, and Western Hemisphere manufacturing. That is the path most likely to increase demand, stabilize price and build a more durable market for growers.

Sources: Robert Antoshak (Sept. 5, 2026); USTR final Section 301 notice; USDA FAS Export Sales; NCTO. Final TRQ rules pending.

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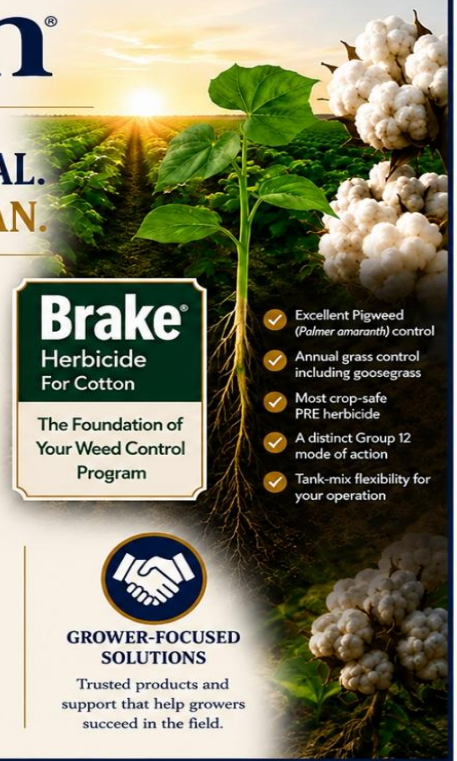
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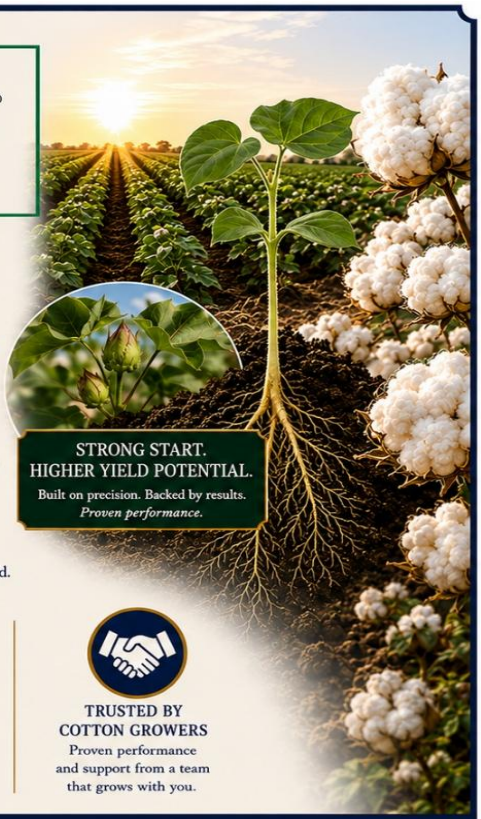
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