THE PIMA FIELD & MARKET JOURNAL PIMA GROWERS

PIMA GROWERS

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

WEEK ENDING SEPTEMBER 11, 2026



COVER STORY

TRACEABILITY HAS A COST— AND PIMA HAS A HEAD START

What deeper proof of origin means for American Pima cotton.

For American Pima, traceability is moving beyond a marketing story. It is becoming a requirement for market access, risk management and value capture.

The chain gets longer from farm to finished product. Pima begins with a visible grower base, identifiable production and a stronger foundation for proof of origin.

FIELD TO FIBER

THE PROOF GETS HARDER AS THE CHAIN GETS LONGER

Visibility at the end of the chain is only as strong as the records, systems and verification behind it. Each step carries cost - and Pima's documented production base offers a meaningful head start.

PIMA'S ADVANTAGE

Closer, verifiable links from farm to spinner help preserve consumer trust and strengthen the case for premium value.

FEATURED IN THIS ISSUE

Traceability Has a Cost	Pages 5-8	Build Traceability to the Claim	Page 8
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BUILDING THE AMERICAN PIMA COTTON ECOSYSTEM

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



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

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

EXECUTIVE SUMMARY

American Pima development continues to outpace historical averages. California remains the strongest-performing production region with excellent crop uniformity and accelerating boll development. Arizona is entering peak boll set and will require careful irrigation management over the next two weeks. Texas recorded the largest week-over-week gain in squaring, though variability from rainfall and heat stress remains elevated. U.S. cotton condition improved to 45 percent Good to Excellent, while American Pima production continues to perform at a wide margin above the national crop.

The American Pima ecosystem depends on collaboration across growers, gins, merchants, brands and consumers. PCIA and Pima Growers remain committed to impartial field intelligence, market insight and industry leadership.

WHO WE ARE

PIMA COTTON IMPROVEMENT ASSOCIATION (PCIA)

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

PIMA GROWERS

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

WHY WE EXIST

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

WHAT WE DO

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

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

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

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

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

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

THE AMERICAN PIMA COTTON ECOSYSTEM

GROWERS — Producing the World's Finest Cotton
→ **PIMA GROWERS** — Connecting & Advancing the Industry
→ **INDUSTRY** — Gins, Merchants, Suppliers & Partners
→ **BRANDS** — Creating Premium Pima Products
→ **CONSUMERS** — Quality, Sustainability & Trust
→ **RESEARCH & INNOVATION** — Investing in the Future of Pima Cotton

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

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MEMBERSHIP

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- Corporate Partner

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- Journal Sponsorships
- Feature Articles
- Industry Partner Pages

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PROTECTING VALUE FROM FIELD TO MARKET

A Tighter Crop Outlook Meets a Stronger Case for Traceability

As the 2026 crop moves toward harvest, lower Pima supply, uneven field conditions and early export demand reinforce the value of verified quality.

WEEK ENDING SEPTEMBER 11, 2026



PIMA PERSPECTIVE

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

USDA's September estimate places American Pima production at 392,000 bales, down 7,000 bales from August. Planted acreage is revised to 142,000 acres and harvested acreage to 137,000 acres. Average yield rises 44 pounds from August to 1,376 pounds per harvested acre.

The regional picture is uneven. California remains the production anchor at an estimated 300,000 bales. Texas is projected at 51,000 bales, Arizona at 30,000 and New Mexico at 11,000. In the weekly all-cotton Pima-belt context, California held at 95% Good + Excellent, Arizona improved to 85%, and Texas fell to 16%.

This is where Pima's value proposition becomes more important. Favorable fields still have the opportunity to deliver quality, but late-season water, heat and harvest execution will determine how much of that potential is realized. In the supplied USDA export-sales report for the week ending September 3, Pima commitments reached 180.1K running bales, 78.6% above year ago.

The journal's traceability feature makes the companion market point. American Pima begins with a documented production system; preserving premium value requires carrying that proof through trade, manufacturing and the finished product. The task is not simply to market a premium. It is to verify it, protect it and give customers a reason to reward it.

KEY TAKEAWAYS

TIGHTER PIMA SUPPLY

392,000 bales; down 7,000 from August.

DIVIDED PIMA-BELT CONTEXT

All-cotton ratings: California 95% Good + Excellent; Arizona 85%; Texas 16%.

EARLY EXPORT DEMAND

180.1K running-bale commitments; 78.6% above year ago.

TRACEABILITY ADVANTAGE

Verified quality connects the grower, market and finished product.

THIS WEEK ACROSS THE JOURNAL

SIGNAL	CURRENT READING
Pima production	392,000 bales
Average yield	1,376 lbs./acre
Pima landed Southeast Asia	$1.86/lb.
Pima current spot	$1.71/lb.
Weekly Pima net sales	10.0K running bales
Total Pima commitments	180.1K running bales

Sources: USDA NASS Crop Production, September 11, 2026; USDA FAS Export Sales / supplied Supima Weekly Pima Market Report, week ending September 3, 2026; Pima Growers market monitor.

Finish the crop with discipline - then protect the proof behind every Pima bale.

Protect fiber quality now. Build verifiable value from field to market.

TRACEABILITY & VALUE

Traceability Has a Cost— And Pima Has a Head Start

What deeper proof of origin means for American Pima cotton

THE BOTTOM LINE

For American Pima, traceability is moving beyond a marketing story. It is becoming a market-access, risk-management and value-capture question.

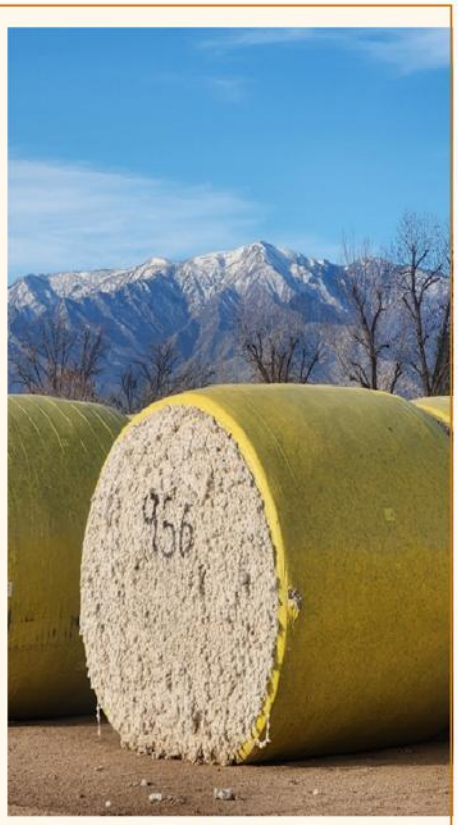
The Proof Gets Harder as the Chain Gets Longer

The claim “this garment contains U.S.-grown Pima cotton” sounds simple. Proving it through a finished product is not. Every handoff among the farm, gin, merchant, spinner, fabric mill, dye house, cut-and-sew factory and retailer adds documentation, commercial sensitivity and cost.

Gherzi Americas frames the work in five practical tiers. The first two are largely a matter of supplier records and contracts. Visibility becomes materially more difficult at spinning, and hardest at the fiber-origin, gin and farm level—the point where Pima’s differentiation begins.

Pima’s Advantage

A concentrated production base, identifiable farms and gins, and premium fiber performance provide a strong starting point. The challenge is preserving that identity after the bale enters the global textile chain.



A real bale, a real landscape and a stronger foundation for proof of origin.

Source: Gherzi Americas, What Traceability Costs, By Tier, Brief No. 10. Pima Growers analysis.

TRACEABILITY FRAMEWORK

The Proof Gets Harder as the Chain Gets Longer

Visibility at the cut-and-sew factory is usually straightforward. The path back through fabric, spinning and fiber origin becomes progressively more difficult—and progressively more valuable when the claim is specific to a product, farm, gin or region.

TIER	WHAT IT COVERS	DIFFICULTY	PIMA IMPLICATION
1	Cut and sew	Easy	Factory identity is usually known.
2	Fabric mill, dyeing and finishing	Moderate	Document suppliers and processes.
3	Spinning	Harder	The key handoff; yarn sourcing is commercially sensitive.
4	Fiber origin, gin and farm	Hardest	Where a specific Pima-origin claim must be supported.
5	Chemical and trim inputs	Rarely attempted	Usually beyond the first Pima traceability program.

The tier framework is the practical starting point: decide what a customer-facing claim must support, then build the chain of custody and verification to match. Page 3 explains why the spinner is the decisive link for American Pima.

BUILD TO THE CLAIM
A general fiber-content claim may require supplier documentation and periodic verification. A product-specific farm or region claim requires stronger custody controls and, potentially, physical segregation or forensic testing.

WHERE COSTS RISE
The meaningful expense begins when a program moves upstream through spinning. Gherzi estimates a 3%-8% segregated-yarn premium, plus system, supplier-engagement, audit and testing costs for deeper visibility.

Source: Gherzi Americas, What Traceability Costs, By Tier, Brief No. 10. Pima Growers analysis.

THE PIMA IMPLICATION

Pima’s Advantage Begins at the Farm

American Pima has an inherent structural advantage: its production base is concentrated, identifiable and comparatively small. The crop is grown in defined regions of Arizona, California, New Mexico and Texas, then moves through a limited number of gins, merchants, warehouses and approved supply-chain participants.

At the farm and gin level, the industry can document acreage, varieties, production practices, classing, bale identity and custody. Those records are meaningful commercial assets. They support the grower story, reinforce U.S. origin and give brands a stronger basis for communicating where their fiber began.

The Spinner Is the Critical Link

Spinning is the point where physical identity can be lost. Spinners commonly blend bales from several origins in a single laydown to manage quality, efficiency and cost. Once fibers are blended, a downstream brand may be able to show that it purchased Pima-containing yarn, but it may not be able to claim that a particular shirt came from a particular farm.

FARM & GIN	MERCHANT / WAREHOUSE	SPINNER	FABRIC & APPAREL
Strongest existing records	Custody and bale control	Highest risk of blending	Product claim must match proof

Mass Balance Versus Physical Segregation

Mass balance tracks volumes through the chain without keeping the material physically separate. It is less expensive and can support a program-level claim, but it cannot identify the farm that produced the fiber in a specific garment.

Physical segregation keeps Pima material distinct end to end. It is more costly because it requires the spinner and downstream partners to preserve identity and absorb reduced efficiency. It is, however, the pathway that can support a specific-product origin claim.

> **“The closer the supply chain can connect consumer value back to the farm, the stronger the case for preserving Pima identity.”**

FROM CLAIM TO PROGRAM

Build Traceability to the Claim

Not every Pima customer needs the same level of proof. A retailer making a general fiber-content or sourcing claim may need supplier documentation, contracts and periodic verification. A premium brand seeking to name U.S.-grown Pima, identify a region or highlight a group of growers will need stronger chain-of-custody controls. A brand promising farm-level provenance for a specific garment needs physical segregation and, potentially, independent forensic verification.

The essential discipline is to decide what the customer-facing claim will be before building the system. A marketing claim, a customer contract and a regulatory inquiry each carry different evidence standards. Building the most expensive possible program when a simpler claim is sufficient wastes money; making the strongest claim without the underlying proof creates risk.

What It Costs to Go Deeper

PROGRAM ELEMENT	GERHZI INDICATIVE RANGE	WHAT IT MEANS FOR PIMA
System and platform	$40k-$150k in year one	Shared systems can reduce duplication across brands and suppliers.
Supplier mapping & engagement	0.5-1.5 FTE ongoing	Relationships with spinners and mills are as important as technology.
Segregated yarn premium	3%-8% of yarn cost	The commercial cost of preserving physical identity.
Forensic testing	$300-$900 per test	Use selectively when product-specific verification is needed.
Audit & verification	$15k-$60k annually	Supports credible claims and customer assurance.

The Pima Path Forward

The objective should not be a one-size-fits-all traceability mandate. It should be a scalable framework: standardize the records already created at the farm, gin and bale level; establish consistent custody practices; identify textile partners willing to run segregated Pima programs; and define the claims that can be made at each level of proof.

American Pima already has what many fiber programs are trying to create: a distinctive crop, a limited production geography, known growers, premium performance and an authentic origin story. The next step is not simply to tell that story more often. It is to preserve enough evidence that the story can travel with the fiber.

EDITORIAL TAKEAWAY
Traceability should be viewed as a value proposition—not merely a compliance expense. The programs that preserve credible origin can strengthen Pima's premium position and improve the connection between consumer value and the farms that create it.

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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 11, 2026

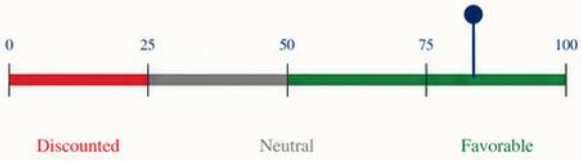
EXECUTIVE SUMMARY

American Pima's value position remains favorable. The current premium over Upland is $0.8494 per pound, above the prior five-year average spread of $0.8200. The current Pima-to-Upland price ratio is 199%.

Pima export commitments reached 180.1K bales in the latest available USDA reporting week, 78.6% above year ago. Weekly exports were 5.2K bales; shipments to date reached 31.4K bales, or 17.4% of commitments. Outstanding sales remain substantial at 148.7K bales.

- **Total Commitments:** 180.1K bales | +78.6% YoY
- **Weekly Exports:** 5.2K bales
- **Current Pima/Upland Spread:** $0.8494/lb

AMERICAN PIMA VALUE POSITION



+$0.8494/LB

PREMIUM OVER UPLAND

Long-Staple Price Ratio: 199%

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	$0.8606	Discount
Upland - Prior 5-Year Average	$0.8300	Reference
Prior 5-Year Average Spread	$0.8200	Reference
Current Pima/Upland Spread	$0.8494	Favorable
WTI Crude Oil	$100.05	External Cost Headwind
Polyester Staple Fiber	$0.57/lb	Cotton Support

SUPPLY & DEMAND

	2024 CROP	2025 CROP EST.	2026 CROP EST.
Acres	200,500	142,000	142,000
Production (Bales)	471,000	388,000	392,000
Ending Stocks (Bales)	140,000	107,000	N/A*

**September Pima production summary does not publish ending stocks.*

DEMAND & CURRENT FACTS

Total Commitments	180.1K
Net Sales - Week 5	10.0K
Weekly Exports	5.2K
Shipped to Date	31.4K
Outstanding Sales	148.7K

COMMITMENTS	ACREAGE VS 2024	PRODUCTION VS 2024	COMMITMENTS SHIPPED
+78.6% YoY	-29.2%	-16.8%	17.4%

WEEK 5 TRADE DETAIL | LATEST AVAILABLE USDA EXPORT SALES

NEW SALES BY MARKET

THOUSAND RUNNING BALES

India	6.6
Peru	1.9
Thailand	0.5
Bangladesh	0.4
Italy	0.4
TOTAL	**10.0**

EXPORTS BY MARKET

THOUSAND RUNNING BALES

India	2.4
Pakistan	1.7
Vietnam	0.5
Thailand	0.4
Other markets*	0.2
TOTAL	**5.2**

Sources: USDA FAS Export Sales, Supima Weekly Pima Market Report— Week 5 (week ending Sept. 3, 2026); TruCott USDA Summary, Sept. 11, 2026; PCIA market indications. Market values as of Sept. 11, 2026.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 5 · Ending September 3, 2026 · MY Aug 2026 – Jul 2027 · Week 5

Demand snaps back: 10.0k bales of week-five sales push the book to 180.1k — the widest YoY gap yet at +78.6%

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
10.0 k RB	**5.2** k RB	**180.1** k RB	**17.4** %	**148.7** k RB
▲ **8.1** no cancels — best wk since opener	▲ **0.6** vs 4.6	▲ **78.6% YoY** LY 100.9	31.4 of 180.1 · LY 40.3%	▲ **4.7** needs ~3.2k/wk over 47 wks

THIS WEEK IN THE MARKET

The pause lasted exactly two weeks. Net sales of 10.0k RB — the strongest week since the opener, with zero cancellations — pushed commitments to 180.1k against 100.9k a year ago. India took 6.6k to reach 77.6k, now 43.1% of the book and 2.3× its year-ago position. Five weeks in, mills have written 70.4k of net new business.

Peru is the quiet climber. A 1.9k add lifted Peru to 11.4k, tied with Egypt for third and 76% above its year-ago book. Thailand (0.5k), Bangladesh (0.4k) and Italy (0.4k) rounded out a five-buyer week — breadth is holding as the season builds.

Shipping is the counterweight to watch. Exports of 5.2k (India 2.4k, Pakistan 1.7k, Thailand 0.7k) brought accumulated shipments to 31.4k, 23% behind last year's start. The two-week pace of 4.9k still covers the required ~3.2k/wk, but the cushion has narrowed from 2.2× to 1.6× while the order book grew to 148.7k.

- Five weeks in: 180.1k committed, +78.6% YoY — the widest gap of the young season, on 70.4k of essentially cancel-free new business.
- India now holds 43% of the book — a high-water mark for concentration; Peru's climb to a tied-third 11.4k is the breadth story.
- Pace coverage narrowed to 1.6× as the order book swelled — fine today, but a second straight week of the cushion shrinking.

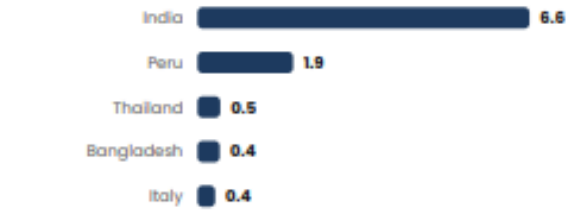
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



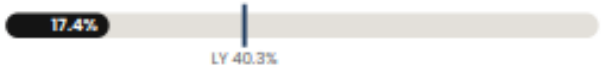
WEEK 5 NEW SALES BY MARKET

k RB, net new business



SEASON SHIPMENT PROGRESS

% of commitments shipped



Season outlook: 47 weeks remain. Outstanding sales of 148.7k RB need ~3.2k/wk; the last two weeks averaged 4.9k (1.6× coverage). The 23% accumulated-export gap to last year is unchanged in kind — a bigger book converting on a normal clock.

SUPIMA AT DTC RETAIL — POWERED BY PARTICL

Particl DTC/e-commerce panel · market index: "Supima" tag, monthly · brand cards: Supima-titled, weekly, wk ending Sep 5

August's final print came in at **$15.9M, ~34% above last August**, lifting the Supima index's trailing twelve months to $228M. Nordstrom eased 7.8% to **$1.02M** in a third week of post-relaunch settling — the core crewneck tee back on top — while Original Favorites cooled 25% to $62K as back-to-school faded, still holding full price and dropping a new Canyon Red colorway for fall.

Market Index

SUPIMA-TAGGED · 81 BRANDS



$228M TTM

1,277 tagged products, monthly. Top users: Nordstrom, Kohl's, Ariat, SPANX, Original Favorites. August finished ~34% above last August.

Nordstrom

OWN-LABEL SUPIMA® · 83 SKUS



$1.02M

▼ 7.8% WoW

19,245 units

Settling toward a ~$1M fall baseline: the $40 crewneck led at $132K across 83 active SKUs, long sleeves close behind.

Top Products

SUPIMA-TITLED · 30 DAYS

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

30-day leaders unchanged; OF's fall palette expansion (Canyon Red, Sep 5) is one to watch on this board.

Sources & method: USDA FAS Export Sales Reporting, CWR, American Pima raw cotton, wk 5 ending 09/03/2026 (MY 26/27) · Particl retail estimates (modeled): market index = Supima-tagged; brand cards = Supima-titled, windows Aug 30–Sep 5 vs Aug 23–29. 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 11, 2026

Executive Summary

Outside-market conditions turned negative for American Pima this week. A sharp rise in energy costs and higher long-term interest rates outweighed stable freight and a nearly unchanged U.S. dollar. China manufacturing remains in contraction, keeping demand risk elevated.

WTI crude settled near $100.05 per barrel. The U.S. Dollar Index closed at 99.09, December 2026 ICE Cotton No. 2 settled at 86.06 cents per pound, and the Freightos Baltic Index eased to $3,520 per FEU.

China's official manufacturing PMI improved to 49.8 but remained below the 50-point expansion threshold. China polyester staple fiber spot was about $0.57/lb, while the U.S. 10-year Treasury yield rose to 4.98%.

Pima Market Environment Index

42



Negative Neutral Positive

NEGATIVE

Weekly: Negative **90-Day: Moderately Positive** **Change: -13**

Primary Risks: Energy Costs, China Demand & Financing

GLOBAL MARKET SNAPSHOT

INDICATOR	SEPT. 11 VALUE	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	**$100.05**	Rising	Headwind
U.S. Dollar Index (DXY)	**99.09**	Flat / Slightly Lower	Neutral
ICE Cotton No. 2 - Dec. 2026	**86.06¢**	Falling	Headwind
China PSF Spot	**$0.57/lb**	Rising	Positive
Ocean Freight (FBX)	**$3,520**	Falling	Positive
U.S. 10-Year Treasury	**4.98%**	Rising	Headwind
China Manufacturing PMI	**49.8**	Improving / Contracting	Primary Headwind

Competitive Position: Negative Near-Term

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

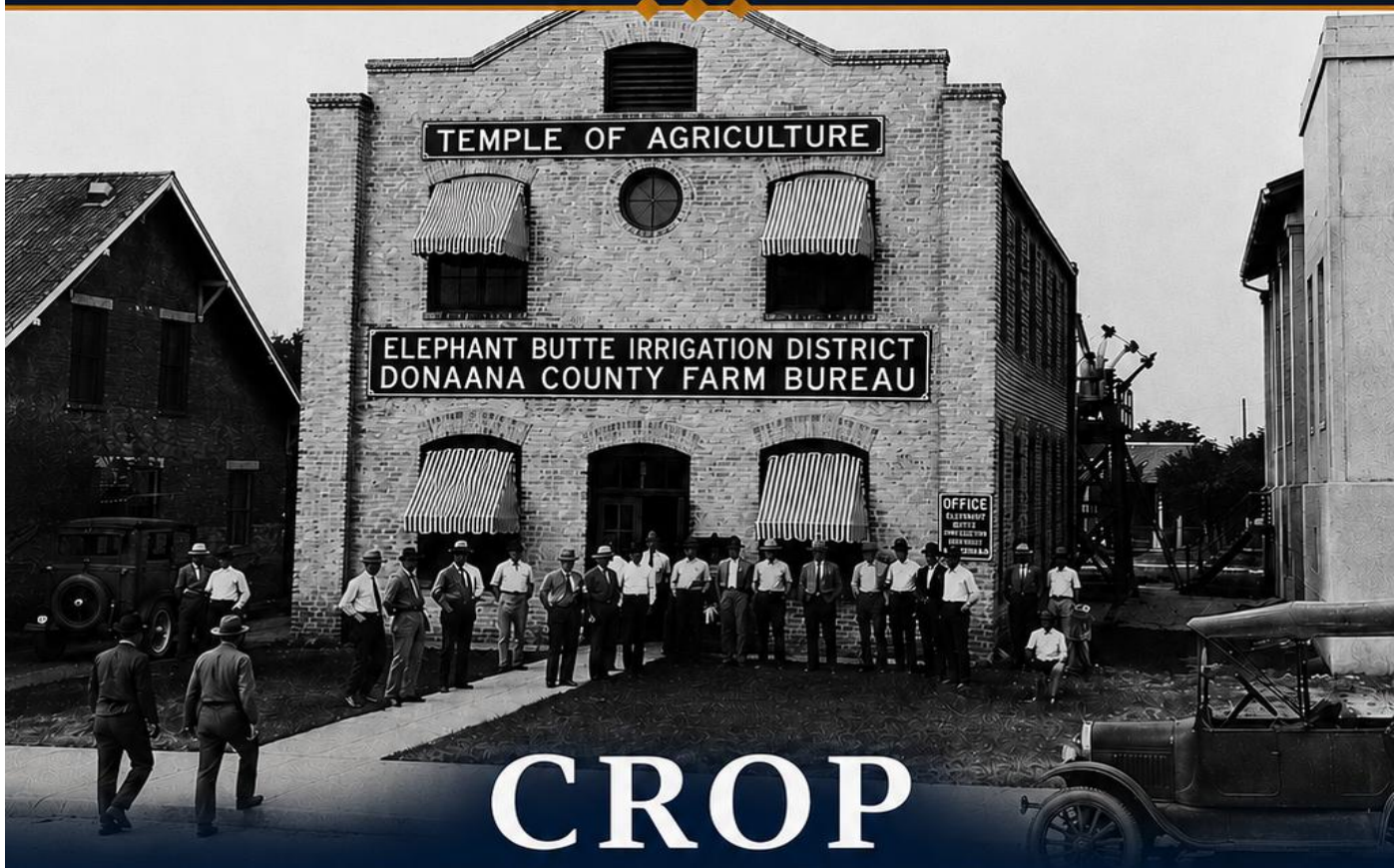
Sources: ICE Futures U.S.; CME/market data; Freightos Baltic Index; SunSirs; U.S. Treasury; China NBS.
September 11, 2026 market values. PSF spot converted from RMB/metric ton using the September 11 USD/CNY rate.
China PMI is the latest official release available at the market close. Values may reflect delayed benchmark publication.


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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 9-8-26
WEEK ENDING 9-11-26

Executive Field & National Crop Summary

U.S. cotton conditions declined this week. The 15-state crop fell to 34% Good to Excellent from 39% last week and is 20 points below the 54% rating one year ago.

Development remains near the seasonal pace: 96% of cotton is setting bolls, equal to the five-year average, while 40% has open bolls, two points ahead of average. Arizona is the most advanced Pima state at 88% open.

Pima-belt conditions diverged. California held at 95% G+E. Arizona improved 12 points to 85%, while Texas fell six points to 16%. Late-season yield and exposed-lint risk now depend increasingly on water supply, heat, and harvest weather.

U.S. COTTON CONDITION

34% G+E



CONDITIONS DECLINE THIS WEEK

Down 5 points week over week

Year Ago: 54%

USDA PIMA-BELT PROGRESS SCORECARD

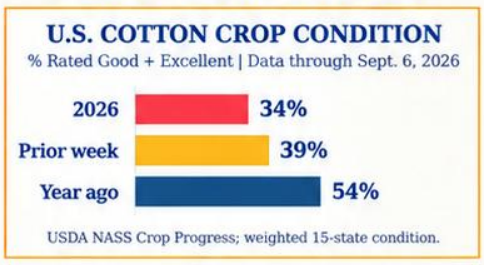
STATE	SETTING BOLLS 2026 / AVG.	BOLLS OPEN 2026 / AVG.	GOOD + EXCELLENT	WEEKLY TREND
CALIFORNIA	99 / 97	25 / 20	95%	UNCHANGED
ARIZONA	100 / 100	88 / 75	85%	UP 12 PTS
TEXAS	95 / 95	37 / 37	16%	DOWN 6 PTS
NEW MEXICO	N/A	N/A	N/A	NOT REPORTED

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 99%; 25% open.

ARIZONA - REBOUND:
Condition improves to 85%; crop reaches 88% open.

TEXAS - PRIMARY RISK:
Only 16% G+E after a 6-point weekly decline.

Sources: USDA NASS Crop Progress, released Sept. 8, 2026; Pima Growers field intelligence; supplied multi-year crop-condition chart.

AMERICAN PIMA SUPPLY OUTLOOK

USDA September 2026 Update

Production eases from August as average yield improves, though late-season conditions remain uneven across the Pima belt.

REPORT DATE SEPTEMBER 11, 2026



EXECUTIVE SUMMARY

USDA's September 2026 estimates project U.S. American Pima production at 392,000 bales, down 7,000 bales from August as planted acreage is revised to 142,000 acres. Harvested acreage is estimated at 137,000 acres. Average yield rises 44 pounds from August to 1,376 pounds per harvested acre.

California remains the backbone of production with 92,000 planted acres and an estimated 300,000 bales. Texas is projected at 51,000 bales, Arizona at 30,000 bales, and New Mexico at 11,000 bales. California and New Mexico account for the lower September total, partially offset by stronger Arizona and Texas estimates.

KEY TAKEAWAYS

PRODUCTION —
392,000 bales; down 7,000 from August.

YIELD —
1,376 lbs./acre; up 44 lbs. from August.

REGIONAL SHARE —
California 300,000 bales (77%); Texas 51,000, Arizona 30,000, New Mexico 11,000.

MARKET POSITION —
Lower supply supports Pima's value story; late-season quality now depends on harvest execution and weather.

2026/27 AMERICAN PIMA PRODUCTION ESTIMATE

Region	May Final Acres	March Estimate Acres	August Estimate Acres	September Estimate Acres	Harvested Acres	Yield lbs.	Production 1,000 bales
PIMA	**142**	**130**	**148**	**142**	**137**	**1,376**	**392**
Arizona	16	15	15	16	15	960	30
California	92	80	95	92	87	1,655	300
New Mexico	13	15	16	13	10	544	11
Texas	21	20	28	21	25	979	51

Source: TruCott USDA Summary, September 11, 2026.

American Pima does not compete primarily on volume.
It competes on quality, consistency, traceability and value.

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

U.S. PIMA COTTON BALANCE SHEET

August 2026 WASDE Update

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

REPORT DATE AUGUST 12, 2026



EXECUTIVE SUMMARY

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

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

KEY TAKEAWAYS

TIGHT STOCKS —
Ending stocks: 101,000 bales.

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

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

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

U.S. PIMA COTTON BALANCE SHEET SUMMARY

IN 1,000 480-LB BALES

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

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

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

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AMERICA'S FINEST COTTON

AMERICAN PIMA LOAN VALUE GUIDE

2026 CROP ELS (AMERICAN PIMA COTTON)

Source: USDA Farm Service Agency (FSA)

Published by PCIA • Presented by PIMA GROWERS

Schedule of Loan Rates for Eligible Qualities

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

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

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

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

BENCHMARK QUALITY

Grade 2 • Leaf 2
Staple 48+

LOAN VALUE

101.70¢/LB

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

QUALITY ADJUSTMENTS (DISCOUNTS)

LEAF DISCOUNTS (POINTS PER POUND)

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

MICRONAIRE DISCOUNTS (POINTS PER POUND)

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

STRENGTH DISCOUNTS (POINTS PER POUND)

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

EXTRANEOUS MATTER PENALTIES (POINTS PER POUND)

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

PIMA QUALITY TARGETS

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

KEY TAKEAWAY

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

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

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

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

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

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AMERICA'S FINEST COTTON



WEATHER

CLIMATE • MOISTURE • TEMPERATURE • FORECASTS

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

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

Weather Drives Yield. Information Drives Decisions.

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 11, 2026

Executive Summary

Daytime heat remained the principal driver of cumulative thermal exposure. Safford retains the highest index at 119 points, followed by El Paso at 102, Deming at 92, Lubbock at 86 and Fresno at 78.

During Sept. 5-11, Safford added seven qualifying hot days; El Paso, Lubbock and Deming added six each; and Fresno added four. No monitored station added a qualifying warm night.

All Pima areas are at full cutout and final irrigation is in progress. Use this index to identify heat exposure while protecting the youngest harvestable bolls through maturity; it does not determine a daily ETc, irrigation amount, or termination date.

This is the likely final 2026 thermal-stress update. Tracking may extend one additional week if late-season conditions warrant.

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	103	16	16	**119**	**+7**	High
Fresno, CA	77	1	1	**78**	**+4**	High
El Paso, TX	91	11	11	**102**	**+6**	High
Lubbock, TX	84	2	2	**86**	**+6**	High
Deming, NM	92	0	0	**92**	**+6**	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	Sept. 5-Sept. 11 local station days
Weekly heat ranges	Fresno 89-105 F; Safford 100-103 F; Deming 94-99 F; El Paso 91-99 F; Lubbock 92-98 F
DD60 relationship	Separate 60 F base / 86 F cap calculation
Final irrigation	use local ETo × reduced late-season Kc; no ET requirement inferred from this index

Heat exposure must be interpreted through crop stage, available plant water and final-irrigation timing.

Source: Iowa Environmental Mesonet ASOS/AWOS daily summaries and underlying observations. Data through Sept. 11, 2026.
Likely final 2026 thermal-stress update; reassess next week only if conditions warrant.

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 11, 2026

Executive Irrigation Summary

All Pima areas are at full cutout and final irrigation is in progress. Late-season water decisions are now focused on carrying the youngest harvestable bolls to maturity while avoiding excess water that prolongs vegetative activity. Modified DD60 gains ranged from 116 at Fresno to 148 at Safford.

Observed rainfall totaled 0.98 inch at Deming, 0.43 inch at El Paso, 0.16 inch at Safford and Lubbock, and 0.00 inch at Fresno. Rainfall must be confirmed in the effective root zone before it reduces final irrigation.

Using a reduced late-season planning ETc assumption of 0.20 inch/day, modeled final-irrigation requirement averaged 1.10 inches. Schedule each field using local ETo × a reduced crop coefficient, soil water, plant recovery and the age of the youngest harvestable boll.

This is the likely final 2026 irrigation update. Tracking may extend one additional week if late-season conditions warrant.

WEEKLY IRRIGATION PLANNING STATUS

MODERATE



Low Moderate High Very High

Standardized final-irrigation planning: 1.10 in

Status: Moderate - 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	Full cutout / open boll - 2,203	**+118**	0.20	0.98	Field check	**0.57**	Rain received; verify root-zone before final furrow
Fresno, CA	Full cutout / open boll - 2,318	**+116**	0.20	0.00	Field check	**1.40**	Final water by boll age and soil water
El Paso, TX	Full cutout / open boll - 2,147	**+138**	0.20	0.43	Field check	**1.03**	Protect late bolls; confirm recovery
Safford, AZ	Full cutout / open boll - 2,111	**+148**	0.20	0.16	Field check	**1.26**	Taper by field; irrigate only as needed
Lubbock, TX	Full cutout / open boll - 1,795	**+133**	0.20	0.16	Field check	**1.26**	Protect Aug. 10 bolls to Sept. 19

*DD60 adds Sept. 5-Sept. 11 gains to Sept. 4 totals (60 F base/86 F cap). The 0.20 in/day ETc is a late-season planning screen; schedule fields with local ETo × reduced Kc, soil water and applied irrigation.

LATE-SEASON WATER PRIORITIES

NEW MEXICO

All fields are at full cutout. Recent rain reduced near-term demand at Deming, but final irrigation remains field-by-field; drip can continue closer to defoliation only as needed to mature harvestable bolls.

WEST TEXAS

A boll set Aug. 10 reaches about 40 days old Sept. 19. Rainfall at Lubbock was limited; apply only enough final water to protect these bolls when plants do not recover from afternoon wilt by the next morning.

FINAL-IRRIGATION CHECK

- ✓ All fields are at full cutout; youngest harvestable bolls guide final water.
- ✓ 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 - protect harvestable bolls, not calendar dates.

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, Sept. 5-Sept. 11, 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. Likely final 2026 irrigation update; reassess next week only if conditions warrant.

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 11, 2026

Executive Weather Summary

All Pima areas are at full cutout and final irrigation is in progress. Late-season heat remained material across the belt, but water demand is now tapering as the crop moves through open boll. Weekly highs reached 105 F at Fresno, 103 F at Safford, 99 F at Deming and El Paso, and 98 F at Lubbock.

Rainfall was uneven. Deming received 0.98 inch, El Paso 0.43 inch, and Safford and Lubbock 0.16 inch each; Fresno received no measurable rain. Assess infiltration and root-zone storage before reducing final irrigations.

Management focus: protect the youngest harvestable bolls through maturity, taper irrigation by field and avoid calendar-date decisions. This is the likely final 2026 weather update; tracking may extend one additional week if late-season conditions warrant.

REGIONAL WEATHER RISK



Primary Risk: Late-Season Heat + Final Irrigation Timing

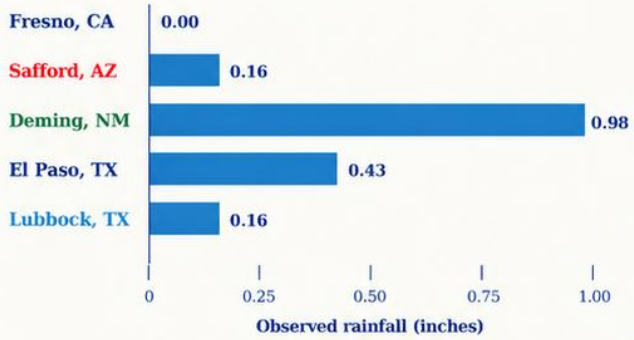
Monitoring: Likely final update; reassess next week

REGIONAL WEATHER & CROP MATRIX

Location	7-day high / low F	7-day rain / effective rain (in)	2026 YTD rain (in)	Weekly DD60 gain	Crop stage	Final-irrigation planning (in)
Fresno, CA	89-105 / 61-74	0.00 / 0.00	4.54	+116	Full cutout / open boll	1.40
Safford, AZ	100-103 / 75-77	0.16 / 0.14	3.27	+148	Full cutout / open boll	1.26
Deming, NM	94-99 / 66-72	0.98 / 0.83	5.06	+118	Full cutout / open boll	0.57
El Paso, TX	91-99 / 69-76	0.43 / 0.37	5.86	+138	Full cutout / open boll	1.03
Lubbock, TX	92-98 / 69-76	0.16 / 0.14	8.82	+133	Full cutout / open boll	1.26

Daily summaries use local station days. Effective rain = 85% of observed. Modified DD60 uses a 60 F base and 86 F cap. Final-irrigation planning uses a reduced 0.20 in/day late-season ETc less effective rain; confirm measured field moisture.

7-DAY OBSERVED RAINFALL



FINAL-IRRIGATION OUTLOOK

With full cutout across the Pima belt, use local ETo × a reduced late-season crop coefficient and measured soil water to finish the crop. The purpose is to carry the youngest harvestable bolls to maturity—not sustain late vegetative growth. This is likely the final 2026 update; continue tracking another week only if conditions warrant.

Station context: rainfall lowers a planning estimate only after considering infiltration, stored soil water, crop stage and irrigation method. Fresno remains dry; Safford and Lubbock received limited amounts.

This page is a weather and crop-risk context tool, not an irrigation schedule or yield model.

CALIFORNIA - FINAL WATER

Fresno reached 105 F and remained dry; protect youngest harvestable bolls with field-specific final water.

SOUTHWEST - FIELD-BASED TAPER

Rain helped Deming and El Paso; confirm root-zone storage before reducing final irrigations.

WEST TEXAS - FINISH THE CROP

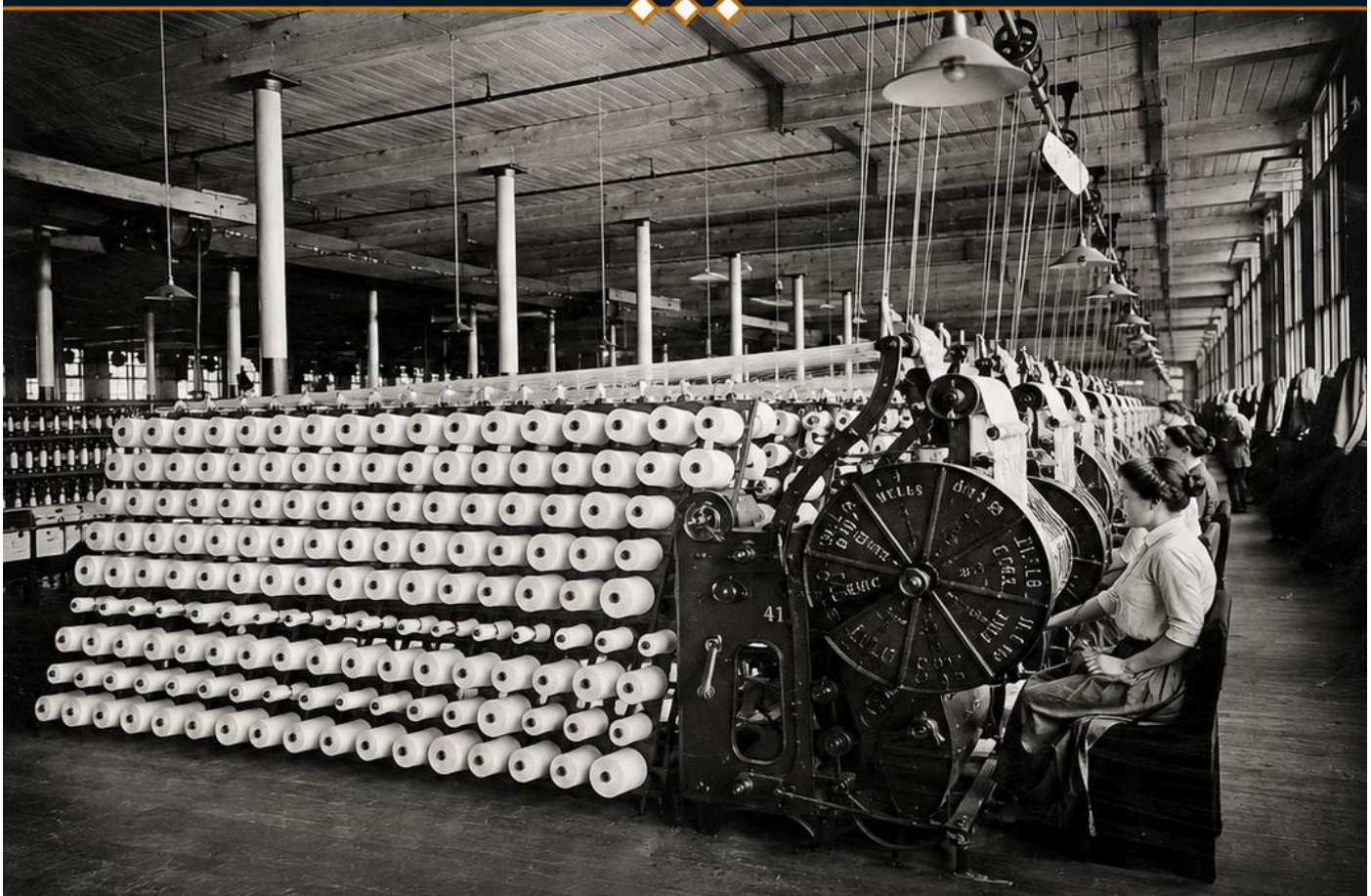
Lubbock heat and limited rain reinforce a careful taper through maturity.

Weather: Iowa Environmental Mesonet ASOS/AWOS daily summaries, Sept. 5-Sept. 11, 2026 - KSAD, KFAT, KELP, KLBB and KDMN. Field context: Pima Growers field intelligence.
Effective rain and planning requirement are screening values, not irrigation prescriptions. Likely final 2026 weather update; reassess next week only if conditions warrant.

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FAR-WEST TEXAS & NM PECOS VALLEY UPDATE

WEEK ENDING 9-11-26






FAR-WEST TEXAS & NM PECOS VALLEY FIELD SUMMARY

FAR-WEST TEXAS & NM PECOS VALLEY | SEPTEMBER 11, 2026

The El Paso/Pecos and New Mexico Pecos Valley crop is progressing well and has reached the early open-boll stage. Despite a poor monsoon, growers have generally been able to keep pace with irrigation demand this year.

Some are extending final irrigation by an additional week because of continued warm weather into early fall.

WEST TEXAS FIELD REPORT

Rainfall, Heat Stress and Harvest Outlook

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

WEEK ENDING SEPTEMBER 11, 2026



RAINFALL, DROUGHT & HARVEST SITUATION

Regional weather-station analysis and Pima Growers field intelligence | September 11, 2026

RAIN BRINGS LIMITED RELIEF

Rainfall brought welcome relief to portions of the Texas High Plains this week, but for much of the region's dryland cotton, the moisture likely came too late to significantly improve yield prospects. There is no dryland Pima cotton planted in West Texas; most Pima is grown on growers' best-watered fields. Even so, prolonged drought and intense late-season heat have raised irrigation demand and will impact 2026 Pima yields.

Of 27 weather stations monitored across the region, 18 recorded rainfall during the latest event, with 11 receiving at least a quarter-inch and three topping one inch. Before the rain, most monitored locations had gone at least 37 days without receiving a quarter-inch rainfall event, while roughly 40% had gone 51 days or longer.

HEAT ACCELERATES MATURITY

Above-average temperatures are pushing the crop rapidly toward harvest. Forecast heat-unit accumulation is running roughly 60% above average at Lubbock and 65% above average at Dumas, accelerating boll opening and defoliation timing. Some fields have already been defoliated, while others are quickly approaching readiness.

FIELD VARIABILITY

Conditions remain highly variable. Pima is concentrated on growers' best-watered fields and is better positioned than regional dryland cotton. Still, the prolonged drought and late-season heat have increased irrigation demand and will impact 2026 Pima yields. Dryland upland cotton in the hardest-hit areas may struggle to produce enough to justify harvest.

18 OF 27 STATIONS

Recorded rainfall in the latest event.

11 TOPPED 0.25 INCH

Three locations received more than one inch.

DRYLAND ≠ PIMA

No dryland Pima is planted in West Texas; this risk applies to regional upland cotton.

HEAT-UNIT SURGE

Forecast accumulation: +60% Lubbock; +65% Dumas versus average.

PIMA WATER RISK

Drought conditions and heat will impact 2026 Pima yields despite stronger water positioning.

PIMA GROWERS INTERPRETATION

There is no dryland Pima cotton planted in West Texas, and most Pima is grown on growers' best-watered fields. That water advantage supports crop completion, but it does not eliminate the effect of prolonged drought and intense heat. The latest rain can aid late boll finish, yet 2026 Pima yields will still be affected by seasonal water stress.

Management priority: finish irrigated Pima fields efficiently, protect quality through timely harvest preparation, and manage water through the last effective boll-filling period.

Source: regional weather-station analysis and Pima Growers field intelligence | September 11, 2026

Edited for clarity and space; agronomic meaning preserved.

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THE PIMA FIELD AND MARKET JOURNAL

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

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TRANSPARENCY & SUPIMA AUTHENTICITY

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

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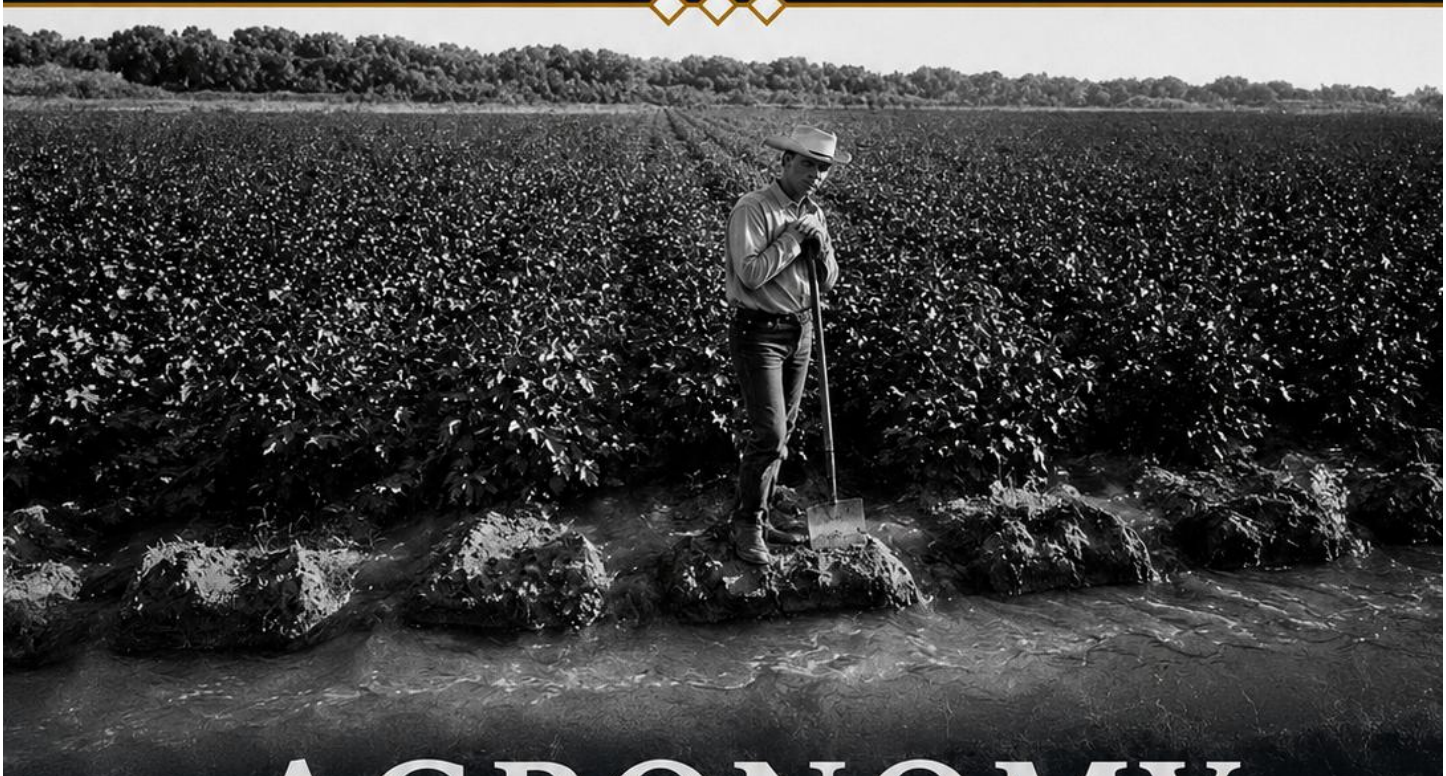
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PIMA FACTS

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AMERICA'S FINEST COTTON

What Is Extra-Long Staple (ELS) Cotton?

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



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

USDA DEFINITION

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

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

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

WHY IT MATTERS

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

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

AMERICAN PIMA COTTON • THE WORLD'S FINEST COTTON

Source: USDA Cotton Program Definitions

GOWAN COTTON COMPANY

HYBRID PIMA SOLUTIONS

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

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

GOWAN 1432

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

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AgLogic®
Proven Maximum Performance



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

BROAD-SPECTRUM PROTECTION

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

EARLY VIGOR & EARLINESS

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

YIELD & FIBER QUALITY

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

KEY BENEFITS

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

Always read and follow label directions.

Supporting American Pima Growers From Emergence Through Harvest.

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



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Final Irrigation in Pima Cotton

Timing the last water across pivot, drip and furrow systems



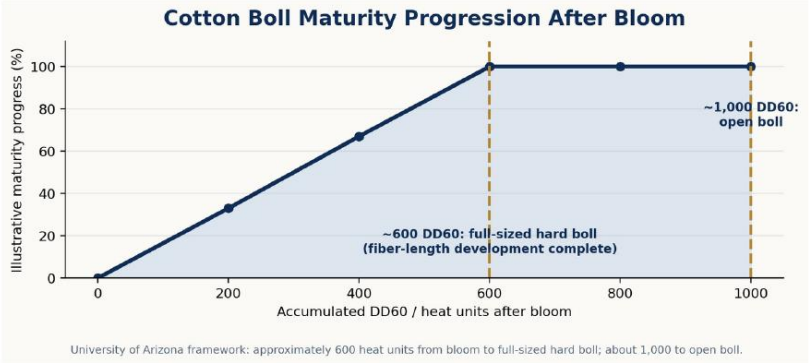
Hero image: irrigation delivery in the Pima production region.

The final irrigation should be a crop decision—not a calendar decision.

The goal is to carry the last bolls that will make the bale through economically important development, then stop. Irrigate too early and upper fruit can lose weight or fiber development; irrigate too long and the crop can retain late growth, consume water without return and complicate harvest management.

A Pima-specific maturity framework

University of Arizona guidance, based on work with common Upland and Pima varieties, places the interval from bloom to a full-sized hard boll at approximately 600 heat units (DD60), roughly 21 days in mid- to late-season Arizona conditions. Fiber-length development is complete by the hard-boll stage; roughly 1,000 heat units are needed from bloom to open boll. The decision is therefore to maintain good plant-water conditions through the selected boll cohort—not to carry every late flower.



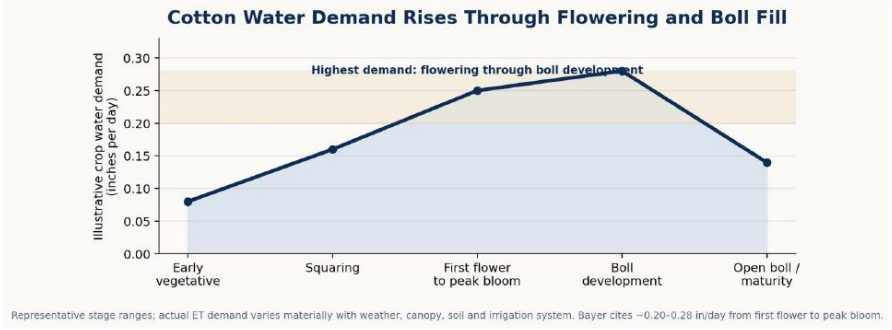
Same Physiology, Different Execution

The crop endpoint is the same across irrigation systems. The delivery system changes how early the final decision must be made and how accurately stored water can be managed.

System	Final-irrigation advantage	Late-season risk	Termination focus
Pivot / LEPA	Frequent, measured applications; good coverage planning.	Waiting too long when system capacity cannot complete a final pass.	Work backward from boll age, forecast and pivot cycle time.
Subsurface drip	Small, frequent applications allow close adjustment to demand.	Keeping small irrigations running after productive boll development is complete.	Confirm uniformity; taper or stop from profile moisture and selected boll age.
Furrow	Can recharge a deep profile where advance and intake are managed.	Uneven advance, deep percolation and a final event that leaves excess water.	Plan earlier; probe multiple locations across the active root zone.

National Cotton Council guidance: NAWF is useful as a benchmark, but it must be interpreted with fruit retention and plant response because it does not distinguish productive reproductive stress from damaging soil-moisture stress.

Operational takeaway: the system changes the execution, not the crop endpoint. The last irrigation must leave enough available soil water to finish the selected boll cohort, without prolonging non-economic late growth.



Sources: Bayer Crop Science, "Cotton Irrigation Scheduling Management"; National Cotton Council, "Water Management."

Making the Final Call

1. Select the last fruit worth carrying. Mark the final blooms or young bolls intended for harvest; do not base the decision on the newest flower in the field.

2. Track boll age and DD60. Allow the selected cohort approximately 600 DD60 and adequate water to reach full-sized hard boll.

3. Check the profile, not just the surface. Assess stored water throughout the effective root zone and in representative soil zones.

4. Match the plan to delivery capacity. Pivot cycle time, drip uniformity and furrow advance determine how far ahead the last irrigation must be planned.

5. Use weather as an adjustment—not the sole trigger. Extended warmth can justify an additional week only if harvestable bolls still require water and the profile is depleting.

6. Protect harvest readiness. Avoid late water that sustains non-economic fruit, delays senescence or increases the risk of difficult defoliation and harvest conditions.

Regional interpretation

In the Southwest and Texas High Plains, a dry and warm late season can extend the final-irrigation date beyond customary calendar windows. Texas High Plains research found the appropriate window shifted earlier in wet years and later in dry years, but soil, cultivar, climate, planting date and management alter the outcome.

Bottom line

The objective is not the greenest September field. It is a mature, uniform, harvest-ready crop with water investment aligned to the bolls that will make the bale.

Selected Sources

• University of Arizona Cooperative Extension. Deciding on the Final Irrigation (AZ1212).
• National Cotton Council. Advancing Cotton Education: Water Management.
• Bayer Crop Science. Cotton Irrigation Scheduling Management; When to Terminate Irrigation in Cotton.
• Ale et al. Determining Optimum Irrigation Termination Periods for Cotton Production in the Texas High Plains. Transactions of the ASABE, 2020.
• New Mexico State University. Drip Irrigation for Row Crops (Circular 573).

Editorial note: Field-specific management framework; account for soil profile, variety, planting date, crop load, water availability, system capacity, pest pressure and local weather.

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FIELD & MARKET JOURNAL



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.

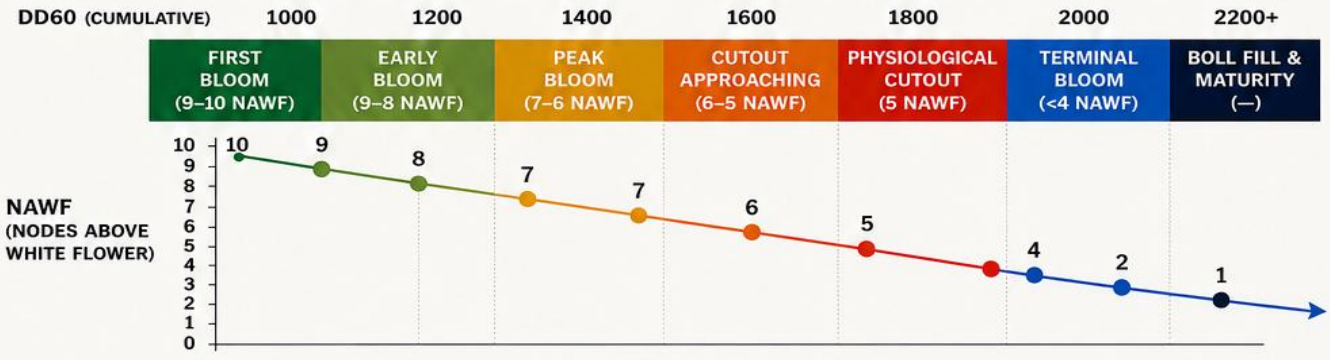
> **"DD60 measures the season. NAWF measures the crop."**

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

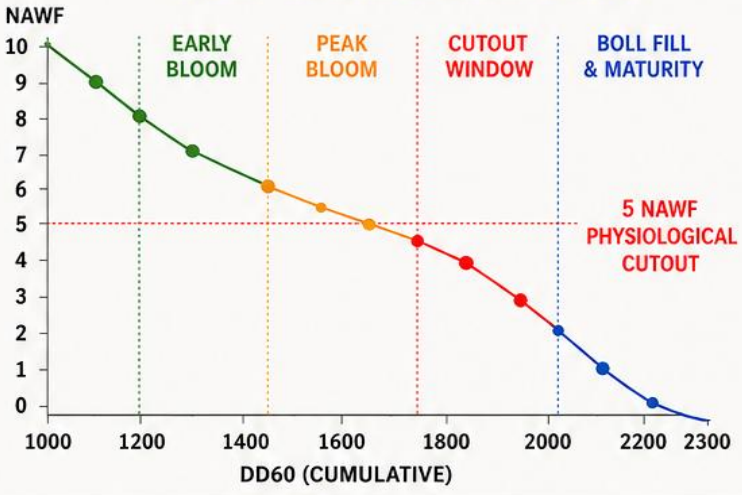


DD60 / NAWF BENCHMARK GUIDE

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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POLICY & TRADE | TEXTILE VALUE

France's Fast-Fashion Law Sends a Clear Market Signal

Low price is not the same as value—and that distinction creates an opening for American Pima and Supima® cotton.



France has begun putting a price on one of apparel's most damaging habits: treating clothing as disposable. Effective September 1, 2026, France's new anti-fast-fashion framework applies higher eco-contributions to ultra-express-fashion practices built around an exceptionally large volume of new product references and little incentive to repair. The policy does not regulate cotton; it regulates a business model that shortens a product's useful life.

What France Changed

French Law No. 2026-602, published July 8, 2026, created a new eco-contribution modulation for qualifying ultra-express-fashion products. The amount reflects two connected issues: the breadth or frequency of product offerings and the practical incentive to repair the item. The intent is direct: make the cost of overproduction and disposability more visible to the market.

2026 ECO-CONTRIBUTION	2030 CEILING
From €0.25 to €12 by product category; the penalty may not exceed 50% of a product's pre-tax sales price.	The scheduled range rises to €2.20 to €20, with the same 50% cap. Products subject to the penalty cannot receive environmental-performance bonuses.

More Than a Fee

The framework also directs covered platforms to provide clear consumer information on social and environmental impacts, delivery impacts and manufacturing locations. Beginning January 1, 2027, advertising and influencer promotion of ultra-express-fashion products will be prohibited in France. The country is sending an unmistakable signal: a garment's purchase price is not the whole measure of its cost.

For the cotton supply chain, this is not a claim of automatic exemption for premium products. A better fiber alone does not make a garment durable. Yarn quality, fabric construction, finishing, fit, manufacturing and care all determine how long a product remains useful. Yet starting with a fiber suited to performance and longevity makes a different value proposition possible.

THE CONSUMER EQUATION

The Real Economics: Price vs. Cost Per Wear

Cost Per Wear (CPW) is a simple consumer-value calculation: upfront purchase price divided by the number of times a garment is worn. It shifts the question from "What does this cost today?" to "What value does this product deliver over its useful life?"

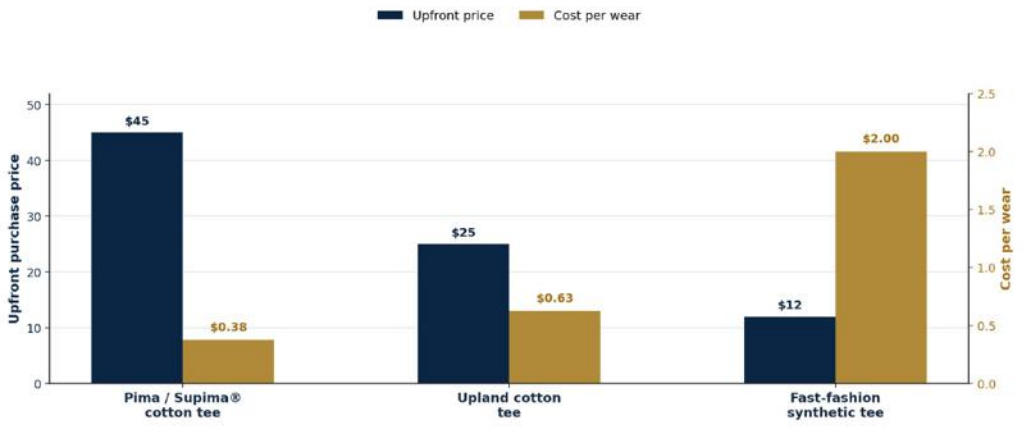
TEE-SHIRT SCENARIO	UPFRONT PRICE	ASSUMED WEARS	COST PER WEAR
Pima / Supima® cotton	$45.00	120	**$0.38**
Upland cotton	$25.00	40	**$0.63**
Fast-fashion synthetic	$12.00	6	**$2.00**

Important: These are model assumptions used to illustrate CPW—not independently validated lifespan averages for each fiber. Actual wear life depends on the finished product, including yarn, construction, finishing, fit, use and care.

PIMA GROWERS | FIELD TO FIBER

The Real Economics: Price vs. Cost Per Wear

Illustrative tee-shirt scenario: Cost per wear = upfront price ÷ assumed wears



Model assumptions: $45 \div 120 wears = 0.38$; $25 \div 40 wears = 0.63$; $12 \div 6 wears = 2.00$.

The assumed wear counts illustrate the cost-per-wear principle; they are not independently validated fiber-life averages. Product longevity depends on construction, finishing, use and care.

Cost Per Wear is an illustrative value model; lower CPW is not a substitute for finished-product performance testing.

SUPIMA® COTTON AND THE DURABLE-VALUE STANDARD

Why Fiber Still Matters

Supima® cotton is American-grown extra-long staple cotton. Its longer fiber supports smoother, finer and stronger yarns when spun and constructed well. That gives brands and mills a platform for products that can feel softer, retain color more effectively and better resist pilling, tearing and breakage over time.

Those characteristics do not replace disciplined manufacturing. A towel, sheet set, T-shirt or polo must still be engineered for use. But a brand beginning with verified premium fiber has a more credible starting point for a product designed to stay in service.

The Opportunity: Proof, Performance and Trust

France's law is a market signal, not a complete solution to textile waste. Still, consumers, regulators and retailers will increasingly demand proof rather than broad promises: more transparency, stronger product performance and a credible explanation of why a garment deserves to be purchased.

That favors a supply chain built around identity and verification. Supima-certified cotton offers American origin, extra-long staple performance potential, a defined certification program and real grower stories. The responsibility is to carry that foundation through to the finished product.

What a Credible Supima Value Proposition Looks Like

AUTHENTIC FIBER Use verified Supima® cotton and communicate origin clearly.

ENGINEERED PERFORMANCE Pair the fiber with yarn, fabric weight, construction and finishing designed for repeated use.

TRANSPARENT QUALITY Describe measurable product characteristics rather than relying on vague premium language.

LONGER OWNERSHIP Design and support products for washing, repair, reuse and a useful life that justifies the purchase.

Buy Better, Buy Less

The strongest response to ultra-fast fashion is not simply a higher price. It is a better product and a clearer promise. A smaller number of trusted essentials can provide better comfort, performance and long-term value.

That is the position American Pima and Supima cotton can occupy: authentic origin, transparent quality, thoughtful manufacturing and products designed to earn a longer life in the consumer's home.

The low-price model sells the moment. Durable value earns the relationship. As the textile industry moves toward greater accountability, that distinction may become one of the most important competitive advantages American Pima has to offer.

SOURCE NOTES

French Government, "The anti-fast-fashion law imposes a new sales framework," July 20, 2026; Law No. 2026-602 of July 8, 2026; Supima®, "The Cotton" and FAQ.

GOOD PEOPLE STRONGER SUPPLY CHAINS

Mid-Week Market Brief

NEWS AND INSIGHT FOR THE TEXTILES & APPAREL TRADE

APPAREL SOURCING TRADE RETAIL A STRONGER TOMORROW

WEDNESDAY, SEPTEMBER 9, 2026

VOL. I • NO. 16

U.S. APPAREL IMPORTS SHRINK — AND CHINA TAKES THE BIGGEST HIT

The latest OTEXA data show U.S. apparel imports down 8.65% year over year to $41.83 billion through July. China's shipments plunged 34.21% to $4.55 billion, pushing it behind Bangladesh. Vietnam remains the largest supplier at $9.36 billion. The shift is not a simple China-to-one-country transfer: Cambodia and Indonesia gained while several other major suppliers lost ground.



THE WEEK'S READ

- U.S. apparel imports fall 8.65%.
- Bangladesh stays ahead of China.
- Inditex sales strong; profit misses.
- Lululemon cuts outlook again.
- Nike climate disclosure proposal fails.

SAME INDUSTRY. A BRIGHTER TOMORROW.

$41.83B	-8.65%	-34.21%	$9.36B	+10.48%	+9%
U.S. IMPORTS	**MARKET**	**CHINA**	**VIETNAM**	**CAMBODIA**	**INDITEX**
Jan.–July apparel imports.	Year-over-year decline.	Apparel shipments to U.S.	Largest U.S. supplier.	Jan.–July shipment growth.	August sales growth.

FIVE STORIES TO WATCH

01 TRADE

U.S. apparel imports fell to $41.83B through July, down 8.65% from a year earlier. Import volume fell 9.41%.



02 SOURCING

Bangladesh held the No. 2 U.S. supplier position at $4.66B as China dropped to $4.55B. Vietnam remained No. 1.



03 WINNERS

Cambodia shipments rose 10.48% and Indonesia 2.76% in a shrinking U.S. market. Sourcing share is moving in several directions.



04 RETAIL

Inditex reported 9% August sales growth, but quarterly profit missed expectations as transport and input costs rose.



05 BRANDS

Lululemon cut its outlook again as leggings sales fell about 20%. Nike shareholders rejected a proposal seeking more climate-target disclosure.





BOTTOM LINE

The latest trade data make one thing clear: U.S. sourcing is changing faster than U.S. demand is growing. China is losing share quickly, but the business is not simply moving to Bangladesh. Vietnam is holding its lead while Cambodia and Indonesia gain ground. Buyers are spreading risk.



BOB'S TAKE

The interesting number is not China's decline. We expected that. It is where the business is going. The answer is several places at once. That makes supplier capability, speed and reliability more important, because diversification only works when the alternatives can actually deliver.

Sources: OTEXA • Reuters • Data through Sept. 9, 2026

BETTER INSIGHT. A STRONGER TOMORROW.

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

CONNECTING AMERICAN COTTON TO THE WORLD'S TEXTILE MILLS

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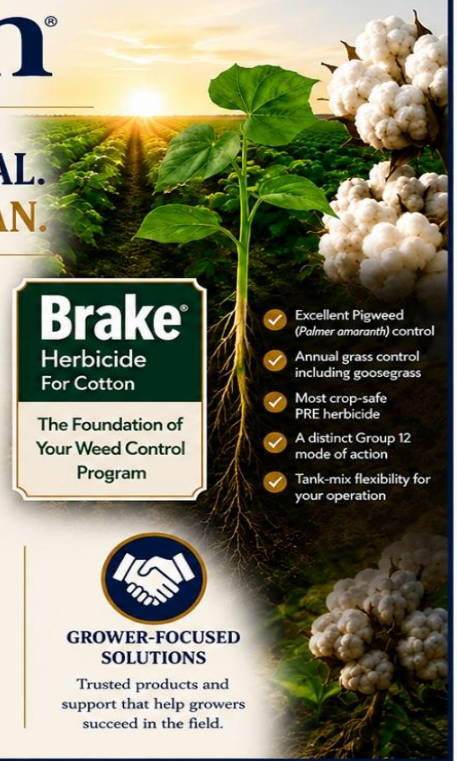
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PROTECT YIELD POTENTIAL. START CLEAN. STAY CLEAN.

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



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

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

GROWER-FOCUSED SOLUTIONS
Trusted products and support that help growers succeed in the field.

HELPING COTTON GROWERS BUILD STRONGER CROPS FROM PLANTING TO HARVEST

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON

GOWAN COTTON COMPANY

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

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



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

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

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

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

ADVANCING AMERICAN COTTON THROUGH HYBRID ELS INNOVATION

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PIMA GROWERS

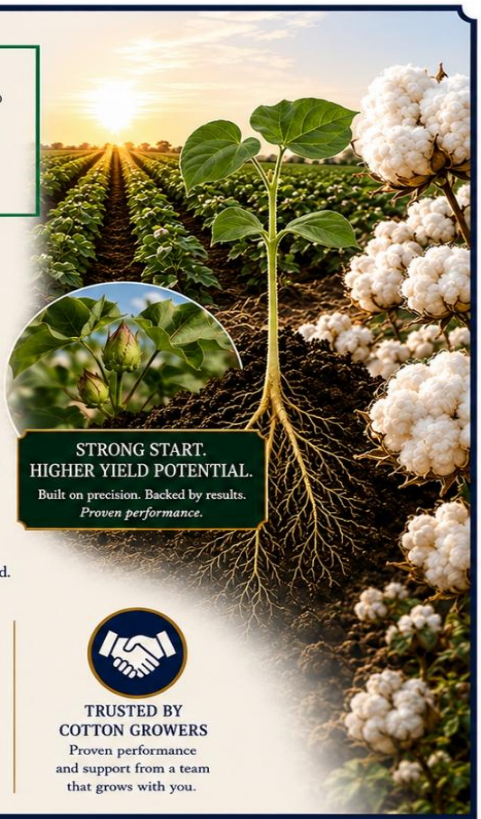
AMERICA'S FINEST COTTON

AgLogic®
Proven Maximum Performance

START STRONG. FINISH STRONG.

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

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



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

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

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

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

HELPING COTTON GROWERS MAXIMIZE PERFORMANCE FROM PLANTING TO HARVEST

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON

MAPLE COOP GIN

PROUD PARTNER. QUALITY FIRST.

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



QUALITY FOCUSED

Committed to delivering premium fiber quality.

GROWER PARTNERED

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

EFFICIENT OPERATIONS

Modern equipment and experienced teams for peak performance.

INTEGRITY DRIVEN

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

SUPPORTING AMERICAN PIMA GROWERS AND DELIVERING PREMIUM QUALITY.

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PIMA GROWERS

AMERICA'S FINEST COTTON

BROWNFIELD Farmers
SAW & ROLLER GIN



GROWER OWNED. QUALITY DELIVERED.

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



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

PREMIUM FIBER QUALITY

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

STATE-OF-THE-ART OPERATIONS

Modern equipment and proven processes ensure consistent, premium results.

GROWER OWNED COOPERATIVE

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

SERVING YOU CAN COUNT ON

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

DEDICATED TO GROWERS. COMMITTED TO QUALITY. DELIVERING VALUE.

8-26-26

PCIA PIMA COTTON PIMA GROWERS IMPROVEMENT ASSOCIATION EST. 2015

JOIN THE AMERICAN PIMA GROWERS NETWORK

Supporting Research, Market Intelligence and Industry Collaboration



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

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

OUR MISSION

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

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

WHY MEMBERSHIP MATTERS

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

MEMBERSHIP LEVELS

CORPORATE PARTNER

$2,500
annually

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

SMALL BUSINESS PARTNER

$1,500
annually

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

INDIVIDUAL PARTNER

$750
annually

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

ALL MEMBERS RECEIVE

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

CORPORATE PARTNER BENEFITS (ADDITIONAL)

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

THANK YOU TO OUR INDUSTRY PARTNERS

CALCOT COTTON MARKETING SERVICES — calcot.com

Gowan — gowanco.com

GOWAN COTTON COMPANY — gowancottonco.com

AgLogic Proven Maximum Performance — aglogic.com

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

MAPLE COOP GIN — (806) 927-5501

BECOME A MEMBER TODAY

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

Contact
Rick Neuenchwander
806-200-2851


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