THE PIMA FIELD & MARKET JOURNAL PIMA GROWERS

PIMA GROWERS

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

WEEK ENDING SEPT. 18, 2026



COVER STORY

WHAT TEXTILE OVERCAPACITY MEANS FOR PIMA

Why a surplus of capacity raises the premium on capability.

Global textile capacity expands while utilization remains weak. Commodity products face more price pressure and thinner margins.

Pima's opportunity rests on specialty capability, authenticated origin and conversion partners that protect fiber performance.

FIELD TO FIBER

CAPABILITY BECOMES THE DIFFERENCE

Premium cotton needs more than an open mill. Fine-count spinning, process control, quality systems and disciplined conversion create the proof behind Pima value.

PIMA'S ADVANTAGE

When commodity capacity is oversupplied, reliable quality, traceability and technically capable partners become more valuable.

FEATURED IN THIS ISSUE

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BUILDING THE AMERICAN PIMA COTTON ECOSYSTEM

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



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

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

EXECUTIVE SUMMARY

PCIA advances American Pima through independent research, market development and industry collaboration. Pima Growers is the organization's public-facing platform—connecting the people who grow this exceptional fiber with the brands, manufacturers, retailers and consumers who value it.

Our work is rooted in a simple belief: American Pima deserves a transparent, resilient and profitable future. By bringing the supply chain together around quality, traceability and education, PCIA helps turn premium fiber into lasting market value.

WHO WE ARE

PIMA COTTON IMPROVEMENT ASSOCIATION (PCIA)

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

PIMA GROWERS

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

WHY WE EXIST

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

WHAT WE DO

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

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

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

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

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

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

THE AMERICAN PIMA COTTON ECOSYSTEM

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

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

CONNECT WITH PIMA GROWERS

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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, disciplined production and verified quality protect premium Pima value.

WEEK ENDING SEPTEMBER 18, 2026



PIMA PERSPECTIVE

By Rick Neuenschwander | CEO, PCIA / Pima Growers

The September Pima outlook remains a tighter supply story. USDA projects 2026 production at 392,000 bales, compared with 388,000 bales in 2025 and 471,000 bales in 2024.

Projected acreage is 142,000 acres, unchanged from 2025 but well below the 200,500 acres reported in 2024. That smaller crop reinforces the importance of protecting value from field execution through the finished product.

The market comparison remains favorable. Pima spot is $1.71/lb, versus 81.15 cents/lb for upland cotton—a current price spread of 89.85 cents/lb. Landed Pima in Southeast Asia is $1.86/lb, while organic Pima trades at $2.30/lb.

Ending stocks tighten further: 2025/26 at 105,000 bales and 2026/27 projected at 92,000 bales. For American Pima, traceability is not a marketing add-on—it is the proof that carries quality through trade and manufacturing.

KEY TAKEAWAYS

TIGHTER PIMA SUPPLY
392,000 bales; 2026/27 ending stocks: 92,000.

DISCIPLINED ACREAGE
142,000 acres; well below 2024's 200,500 acres.

PREMIUM MARKET SPREAD
Pima spot $1.71/lb; Pima/upland spread 89.85 cents/lb.

TRACEABILITY ADVANTAGE
Verified quality connects field, market and product.

MARKET SNAPSHOT

SIGNAL	CURRENT READING
Pima landed Southeast Asia	$1.86/lb
Pima current spot	$1.71/lb
Pima organic trading	$2.30/lb
Upland current spot	$0.8115/lb
Oil (WTI)	$100.30/bbl
Polyester staple fiber	$0.59/lb

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

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

Sources: USDA September 2026 crop outlook; USDA export-sales reporting; supplied Pima Journal Field and Market Report, week ending Sept. 18, 2026.

WHAT TEXTILE OVERCAPACITY MEANS FOR AMERICAN PIMA

The world may be long on commodity capacity - but short on the right capability.

FEATURE ARTICLE • 9-18-26

The central distinction

The textile industry is not simply oversupplied.
It is oversupplied in the wrong places.

Pima's opportunity is specialty capability:
premium yarn, fabric, finishing and
authenticated conversion - not commodity volume.



Robert Antoshak's September Gherzi Americas Perspective, "We Built Too Much," delivers an uncomfortable but useful message: global textile capacity continues to expand faster than end-market demand.

New spinning, weaving, synthetic-fiber, knitting and apparel capacity is being announced across the world while many existing facilities remain underutilized. China's textile utilization declined to 74.9% in the second quarter of 2026. U.S. textile-mill utilization averaged 69.5% through 2025. Yet governments, lenders and investors continue to support new projects in India, Southeast Asia, Mexico, Egypt and elsewhere.

For commodity textile products, the consequence is predictable: more machinery competes for a limited pool of orders. Pricing weakens, margins narrow, and mills begin operating for volume rather than return.

Capacity Is Not One Bucket

A conventional mill cannot simply decide to become a fine-count Pima spinner. A facility may have available ring-spinning capacity but lack the equipment configuration, process control, contamination discipline, trained workforce, quality systems or commercial relationships necessary to produce premium yarn consistently.

The same is true farther downstream. A basic knitting operation cannot automatically make refined shirting, premium jersey, luxury bedding or high-performance home-textile constructions. A commodity finishing line may not preserve the hand, appearance, strength and durability consumers expect from premium cotton.

Why this matters for Pima

Pima does not compete primarily for the same demand as the world's most abundant commodity cotton.
Its value is created through specialty capability: finer yarn counts, higher-value constructions, disciplined processin
superior finishing, authenticated origin and dependable quality control.

Source: Robert Antoshak, "We Built Too Much," Gherzi Americas Perspectives No. 06, September 2026. Pima Growers analysis.

WHAT OVERCAPACITY MEANS FOR PIMA

Premium fiber is only as valuable as the manufacturing system that protects it.

Cheap Capacity Can Become Expensive

The least expensive supplier is not always the least expensive supply-chain decision.

Overcapacity gives buyers leverage. A crowded supplier base creates more options, more price pressure and more aggressive negotiations. In the short term, that can look beneficial to brands and sourcing organizations.

But a mill operating on inadequate margins eventually begins making choices that do not appear on a costing sheet. Maintenance gets delayed. Training budgets shrink. Working capital tightens. Quality, compliance and traceability systems can drift.

For Pima, that risk is substantial. Premium cotton is only as valuable as the manufacturing system that protects its performance and identity from bale through spinning, knitting or weaving, finishing and final product.

Pima supply-chain standard

A low-cost conversion route that compromises quality, delivery, origin verification or financial stability can become more expensive than the initial savings suggested.

What This Means for Pima Growers

American Pima's durable advantage is not volume. It is differentiation. That differentiation becomes more valuable when commodity textile markets are oversupplied. Brands seeking to reduce supply-chain risk, improve product quality and make credible origin claims will need partners that provide more than the lowest price.

For the Pima supply chain, this means selecting financially sound and technically capable manufacturing partners; building relationships with mills experienced in fine-count and premium-cotton processing; preserving identity through conversion; and connecting fiber quality to measurable finished-product performance.

SPECIALTY CAPABILITY

The question is not whether a spinner has open capacity. It is whether it can deliver the count, construction, quality, lead time and documentation Pima needs.

THE STRATEGIC OPPORTUNITY

The next cycle will reward capability that remains relevant when commodity pricing weakens - not capacity for its own sake. Protect the premium supply chain accordingly.

Bottom Line

American Pima is strongest when presented as a managed field-to-fiber system:
U.S.-grown origin, known growers, authenticated supply, capable conversion partners and durable finished products.

Source: Robert Antoshak, "We Built Too Much," Gherzi Americas Perspectives No. 06, September 2026. Pima Growers analysis.

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AMERICA'S FINEST COTTON



MARKET INTELLIGENCE

PRICES
Tracking market movements that impact value.

TRENDS
Identifying patterns shaping today and tomorrow.

INSIGHTS
Delivering knowledge that drives confident decisions.

OPPORTUNITIES
Spotting potential and creating paths for growth.

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STATE OF AMERICAN PIMA

Fiber Value, Supply and Export Demand

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

WEEK ENDING SEPTEMBER 18, 2026

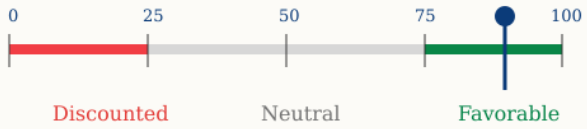
EXECUTIVE SUMMARY

American Pima's value position remains favorable. The current premium over Upland is $0.8985 per pound, above the prior five-year average spread of $0.8200. The current Pima-to-Upland price ratio is 211%.

Export demand stayed firm for a sixth straight week. Total commitments reached 188.4K bales, 77.7% above last year. Weekly net sales were 8.3K bales; exports were 4.1K bales.

- **Total Commitments:** 188.4K bales | +77.7% YoY
- **Weekly Exports:** 4.1K bales
- **Current Pima/Upland Spread:** $0.8985/lb

AMERICAN PIMA VALUE POSITION



+$0.8985/LB

PREMIUM OVER UPLAND

Long-Staple Price Ratio: 211%

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	$0.8115	Discount
Upland - Prior 5-Year Average	$0.8300	Reference
Prior 5-Year Average Spread	$0.8200	Reference
Current Pima/Upland Spread	$0.8985	Favorable
WTI Crude Oil	$100.30	External Cost Headwind
Polyester Staple Fiber	$0.59/lb	Competitive Headwind

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	101,000

DEMAND & CURRENT FACTS

Total Commitments	188.4K
Net Sales - Week 6	8.3K
Weekly Exports	4.1K
Shipped to Date	35.5K
Outstanding Sales	152.9K

COMMITMENTS	ACREAGE VS 2024	PRODUCTION VS 2024	COMMITMENTS SHIPPED
+77.7% YoY	-29.2%	-16.8%	18.8%

WEEK 6 TRADE DETAIL | LATEST AVAILABLE USDA EXPORT SALES

NEW SALES BY MARKET
THOUSAND RUNNING BALES

India	3.4
Bangladesh	2.2
Thailand	1.5
Peru	0.7
Pakistan	0.5
TOTAL	8.3

TOP MARKETS — TOTAL COMMITMENTS
THOUSAND RUNNING BALES

India	81.0
Vietnam	39.9
Peru	12.1
Egypt	11.4
China	9.3

Sources: USDA FAS Export Sales, Supima Weekly Pima Market Report — Week 6 (week ending Sept. 10, 2026); USDA September Pima summary; PCIA market indications. Market values as of Sept. 18, 2026.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 6 · Ending September 10, 2026 · MY 2026/27 (Aug–Jul)

Sixth Straight Week of Sales Keeps the Book 78% Ahead of Last Year

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
8.3 k RB	**4.1** k RB	**188.4** k RB	**18.8** %	**152.9k**
▼ 1.7 no cancels; 6th straight positive week	▼ 1.1 vs 5.2	▲ 77.7% YoY LY 106.0	35.5 of 188.4 · LY 40.5%	▲ +4.2k WoW needs ~3.3k/wk to ship out

THIS WEEK IN THE MARKET

Demand stayed firm. Mills booked another 8.3k RB of Pima with zero cancellations — the sixth consecutive positive week of MY 2026/27. Total commitments now stand at 188.4k RB, 77.7% ahead of last year's 106.0k at the same point, and net new business for the young season has reached 78.7k RB.

Shipments eased; the pace cushion narrowed again. Exports slipped to 4.1k RB from 5.2k, leaving accumulated shipments at 35.5k — 17.5% behind last year, an improvement from −23% two weeks ago. But only 18.8% of the book has shipped versus 40.5% a year ago, and the 2-week export pace now covers the required clearance rate just 1.4×, a fourth straight weekly decline in that cushion.

Buying broadened beyond the anchors. India added 3.4k RB (81.0k total, 43.0% of the book) and took 2.9k of the week's 4.1k in shipments. Bangladesh (2.2k) and Thailand (1.5k) posted rare top-tier weeks, while Vietnam holds second at 39.9k — nearly double its year-ago pace.

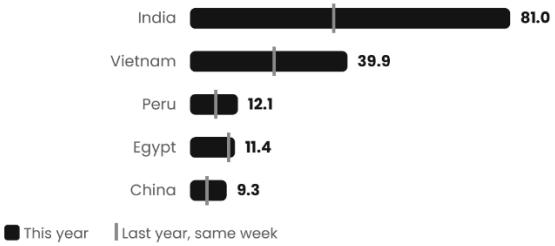
› The 188.4k RB book is the widest YoY lead of the young season in absolute terms (+82.4k), with India and Vietnam alone holding 64% of it.

› Watch item: export pace coverage fell to 1.4× (from 2.6× at wk 3). Pace must hold near 3.3k/wk as harvest-season volume builds.

› Bangladesh and Thailand together booked 3.7k RB — early evidence the demand base is broadening past the top-two markets.

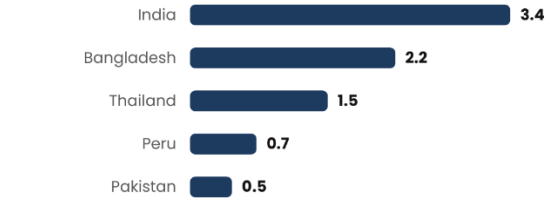
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



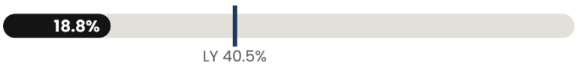
WEEK 6 NEW SALES BY MARKET

k RB



SEASON SHIPMENT PROGRESS

% of commitments shipped



With 46 weeks left, clearing the 152.9k RB of outstanding sales requires ~3.3k RB/wk of exports. The recent 2-week average of 4.6k covers that 1.4× — still adequate, but the margin has narrowed every week since week 2 and remains the number to watch as new-crop shipments begin.

SUPIMA AT DTC RETAIL — POWERED BY PARTICL

Particl DTC/e-commerce panel · market index: "Supima" tag, monthly · brand cards: Supima-titled, weekly, wk ending September 12, 2026

Tracked Supima retail had its strongest week of the fall: Nordstrom's Supima-titled program sold $1.48M across 64 styles (+45.1% WoW, 30.4k units) as September launches — a 3/4-sleeve tunic and no-iron oxford — joined the core tee franchise. The Supima market index printed $15.8M for August, up 36.5% YoY; trailing-12-month sales stand at ~$223M across 81 brands.

Market Index

SUPIMA-TAGGED · 81 BRANDS



$223M TTM

1,302 tagged products, monthly. Top users: Nordstrom, Kohl's, Ariat, SPANX, Original Favorites. holiday peak Nov–Dec

Nordstrom

OWN-LABEL SUPIMA® · 64 SKUS



$1.48M

▲ 45.1% WoW

30,375 units

Long-sleeve crew alone did $323k as fall sell-through started near full price

Top Products

SUPIMA-TITLED · 30 DAYS

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

Trailing-year leaders · all Nordstrom own-label

Sources & method: Sources: USDA FAS Export Sales Report (cotton year Aug–Jul, thousands of running bales, week ending Sep 10, 2026); Particl retail intelligence — DTC e-commerce only, excludes wholesale, offline, and several of the largest Supima users (e.g., UNIQLO). DTC windows: Sep 6–12 vs Aug 30–Sep 5, 2026. Forecast = required weekly export pace vs trailing 2-week average. Prior-MY comparisons from USDA prior-year 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 18, 2026

Executive Summary

Outside-market conditions deteriorated for American Pima.
Trading Economics cotton fell 1.02¢ to 81.15¢/lb.
DXY ended at 100.22; the 10-year yield reached 5%.
WTI held near $100 per barrel, sustaining energy exposure.

China manufacturing remains below 50, signaling contraction. Lower cotton, dollar strength, higher rates and lower polyester add to the setback.

Pima Market Environment Index

31



Negative Neutral Positive

NEGATIVE

Weekly: Negative **90-Day: Moderately Positive** **Change: -11**

Primary Risks: Dollar Strength, Rates & China Demand

GLOBAL MARKET SNAPSHOT

INDICATOR	SEPT. 18 VALUE	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	**$100.30**	Slightly Higher	Headwind
U.S. Dollar Index (DXY)	**100.22**	Rising	Headwind
Cotton (Trading Economics)	**81.15¢**	Falling	Headwind
China PSF Spot	**$0.59/lb**	Falling	Headwind
Ocean Freight (FBX)	**$3,520***	No verified update	Neutral
U.S. 10-Year Treasury	**5.00%**	Rising	Headwind
China Manufacturing PMI	**49.8**	Below 50 / Contracting	Primary Headwind

Competitive Position: More Challenged Near-Term

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

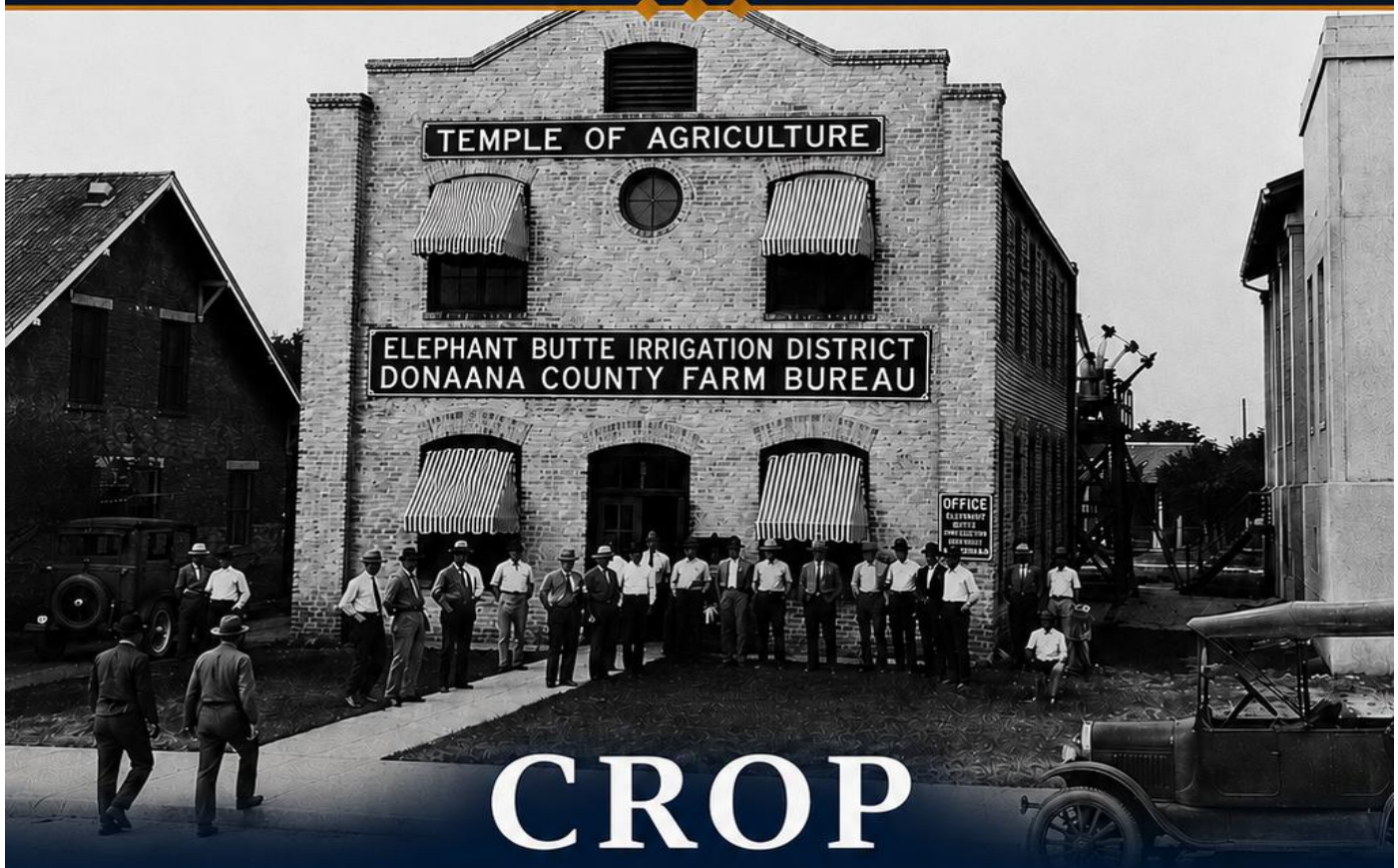
Sources: Trading Economics; SunSirs; Freightos Baltic Index; U.S. Treasury; China NBS.
September 18, 2026 market values. China PSF: $0.59/lb (8,641.92 CNY/mt ÷ 6.69531 USD/CNY ÷ 2,204.62 lb/mt).
*FBX is the last verified benchmark where no weekly update was available. China PMI is the latest official release at market close.


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CROP INTELLIGENCE

FIELD CONDITIONS | CROP PROGRESS | WEATHER IMPACTS | IRRIGATION UPDATE | PEST & DISEASE SCOUTING | YIELD OUTLOOK

Timely Insights. Stronger Decisions. Better Outcomes.

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WEEKLY CROP PROGRESS

American Pima Production Update

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

REPORT DATE 9-15-26
WEEK ENDING 9-18-26

Executive Field & National Crop Summary

U.S. cotton condition improved slightly this week. The national crop is 35.7% Good to Excellent, up from 34.9% the prior week. The gain reflects stronger ratings in Arizona, Texas, Missouri, North Carolina and Oklahoma, despite declines in several Southeast states.

For the Pima belt, California remains steady at 95% Good + Excellent. Arizona advanced 12 points to 97%, while Texas improved two points to 18%. Crop opening continues ahead of the five-year average in Arizona and Texas; harvest is near the national seasonal pace.

U.S. COTTON CONDITION

35.7% G+E



CONDITIONS IMPROVE THIS WEEK

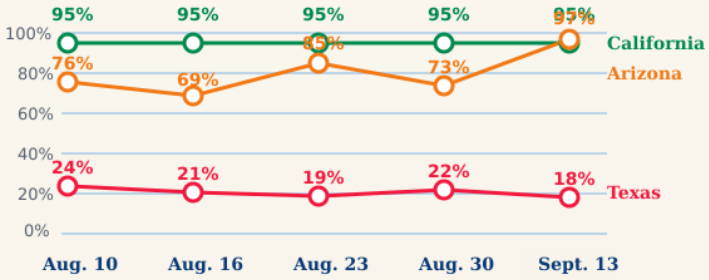
Up 0.8 points week over week
Year ago: 54%

USDA PIMA-BELT CONDITION SCORECARD

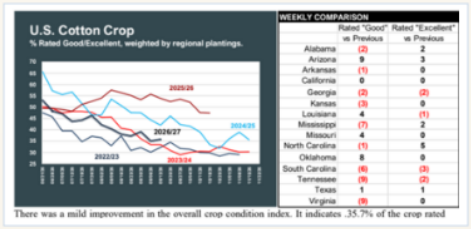
STATE	GOOD + EXCELLENT CURRENT / PRIOR WEEK	WEEKLY CHANGE GOOD + EXCELLENT	USDA RELEASE NOTE CROP STAGE / REPORTING
CALIFORNIA	95% / 95%	UNCHANGED	Maturing; condition steady
ARIZONA	97% / 85%	UP 12 PTS	Open-boll progress ahead of average
TEXAS	18% / 16%	UP 2 PTS	Open-boll progress ahead of average
NEW MEXICO	N/A	NOT REPORTED	Not separately reported

USDA state figures cover all cotton and are used here as Pima-belt context. New Mexico is not separately reported.

PIMA-BELT CONDITION TREND



MULTI-YEAR CONTEXT



CALIFORNIA – LEADING:

95% G+E; condition remains steady.

ARIZONA – REBOUND:

Up 12 points to 97% G+E.

TEXAS – IMPROVING:

Up 2 points to 18% G+E.

Sources: USDA NASS Crop Progress, released Sept. 14, 2026; Pima Growers field intelligence; supplied U.S. 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

September 2026 WASDE Update

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

REPORT DATE SEPTEMBER 11, 2026



EXECUTIVE SUMMARY

The September WASDE confirms a further tightening in the U.S. Pima balance sheet. Beginning stocks are projected at 105,000 bales, production at 392,000 bales and total supply at 497,000 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 92,000 bales, a new low for the current outlook. 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: 92,000 bales.

PRODUCTION —
392,000 bales; down 13,000 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	105
Production	405	392
Imports	0	0
Total Supply	**572**	**497**
Consumption	5	5
Exports	462	400
Total Demand	**467**	**405**
Unaccounted	0	0
Ending Stocks	**105**	**92**

The September balance sheet reflects further tightening in supply, with ending stocks falling to 92,000 bales.

Source: USDA — World Agricultural Supply and Demand Estimates (WASDE), September 11, 2026.

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PIMA GROWERS

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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PIMA GROWERS

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 18, 2026

Executive Summary

Daytime heat moderated across the Pima belt. From Sept. 12–18, Safford added three hot days. Lubbock added four. El Paso and Deming each added two; Fresno added one. No station recorded a qualifying warm night during the period.

Cumulative exposure remains highest at Safford, at 122 points, followed by El Paso at 104. This index flags heat exposure through late season; it does not determine crop ET, irrigation amount, yield loss or a termination date.

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	106	16	16	**122**	**+3**	High
Fresno, CA	78	1	1	**79**	**+1**	High
El Paso, TX	93	11	11	**104**	**+2**	High
Lubbock, TX	88	2	2	**90**	**+4**	High
Deming, NM	94	0	0	**94**	**+2**	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. 12–Sept. 18 local station days
Weekly heat ranges	Fresno 81–98 F; Safford 80–99 F; Deming 83–96 F; El Paso 90–99 F; Lubbock 89–102 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.

Sources: Local airport daily summaries via Weather Underground; index method and underlying observations. Data through Sept. 18, 2026. Screening index; 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 and root-zone water.

WEEK ENDING SEPTEMBER 18, 2026

Executive Irrigation Summary

Crop progress across the Pima belt is now in a range of 20–50% open bolls. Final-irrigation decisions should focus on carrying the youngest harvestable bolls to maturity while avoiding water that prolongs vegetative activity or delays harvest preparation.

Sept. 12–18 DD60 gains ranged from 94 at Fresno to 129 at Lubbock. These station-based screens identify late-season heat accumulation, but field soil water, plant recovery and boll age remain the decision drivers.

FINAL-IRRIGATION PLANNING STATUS

MODERATE



Field-based final-irrigation planning

Taper by field; verify root-zone water and crop recovery

REGIONAL IRRIGATION DECISION TABLE

Location	Crop stage / Cumulative DD60*	Weekly DD60 gain	Root-zone status	Final-irrigation decision cue	Priority
Deming, NM	20–50% open · 2,317	**+114**	Field check	Taper; verify soil water	Boll maturity
Fresno, CA	20–50% open · 2,412	**+94**	Field check	Final water by boll age	Boll maturity
El Paso, TX	20–50% open · 2,272	**+125**	Field check	Protect late bolls	Plant recovery
Safford, AZ	20–50% open · 2,232	**+121**	Field check	Irrigate only as needed	Soil water
Lubbock, TX	20–50% open · 1,924	**+129**	Field check	Protect late bolls	Plant recovery

*DD60 adds Sept. 12–18 gains to Sept. 11 totals (60 F base / 86 F cap). Use local ETo × reduced Kc and measured root-zone water for final scheduling.

LATE-SEASON WATER PRIORITIES

PIMA BELT

Open-boll progress is 20–50%. Maintain enough water to mature harvestable fruit, but taper by field soil water, plant recovery and youngest harvestable boll age.

WEST TEXAS

Protect late bolls where plants do not recover from afternoon wilt by the next morning; avoid calendar-based irrigation once final maturation begins.

FINAL-IRRIGATION CHECK

- ✓ Open-boll progress and youngest boll age guide water.
- ✓ Root-zone moisture is adequate to finish the crop.
- ✓ Plants recover from afternoon wilt by morning.
- ✓ Boll opening and weather support termination timing.
- ✓ 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

Approximate; adjust for ET demand, crop stage, measured field conditions and irrigation system.

Sources: local airport summaries, Sept. 12–18, 2026; Pima Growers field context. 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 18, 2026

Executive Weather Summary

Crop development now ranges from 20–40% open bolls. Rainfall was uneven: Safford 3.48 in; Lubbock 2.53 in; El Paso 1.05 in; Deming 1.01 in; Fresno remained dry.

DD60 gains ranged from 94 at Fresno to 129 at Lubbock. Confirm infiltration and root-zone storage before reducing final water. Protect harvestable bolls; taper by field.

REGIONAL WEATHER RISK

ELEVATED



Primary Risk: Late-season heat + timing

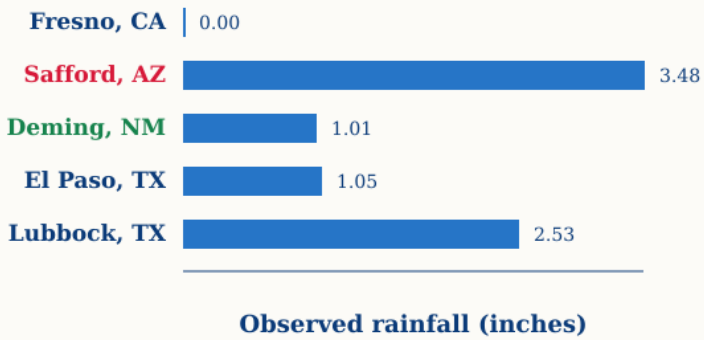
Monitoring: Infiltration, soil water, maturity

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-water planning (in)
Fresno, CA	81–98 / 58–67	0.00 / 0.00	**4.54**	**+94**	20–40% open	1.40
Safford, AZ	80–99 / 66–71	3.48 / 2.96	**6.75**	**+121**	20–40% open	0.00
Deming, NM	83–96 / 64–71	1.01 / 0.86	**6.07**	**+114**	20–40% open	0.54
El Paso, TX	90–99 / 67–74	1.05 / 0.89	**6.91**	**+125**	20–40% open	0.51
Lubbock, TX	89–102 / 66–78	2.53 / 2.15	**11.35**	**+129**	20–40% open	0.00

Daily summaries use local station days. Effective rain = 85% of observed. DD60: 60 F base / 86 F cap. Final-water figures are planning screens; confirm field moisture.

7-DAY OBSERVED RAINFALL



FINAL-IRRIGATION OUTLOOK

With 20–40% open bolls, use local ETo × a reduced late-season Kc and measured soil water to finish the crop. Carry harvestable bolls to maturity—not vegetative growth.

Recent rain lowered modeled final-water needs at Safford and Lubbock. Verify infiltration and stored soil water before reducing irrigation further.

Weather and crop-risk context—not an irrigation schedule or a yield model.

CALIFORNIA — FINAL WATER

Fresno remained dry; use field-specific final water to protect harvestable bolls.

SOUTHWEST — FIELD TAPER

Rain in AZ/NM: confirm root-zone storage before reducing final irrigations.

WEST TEXAS — FINISH CROP

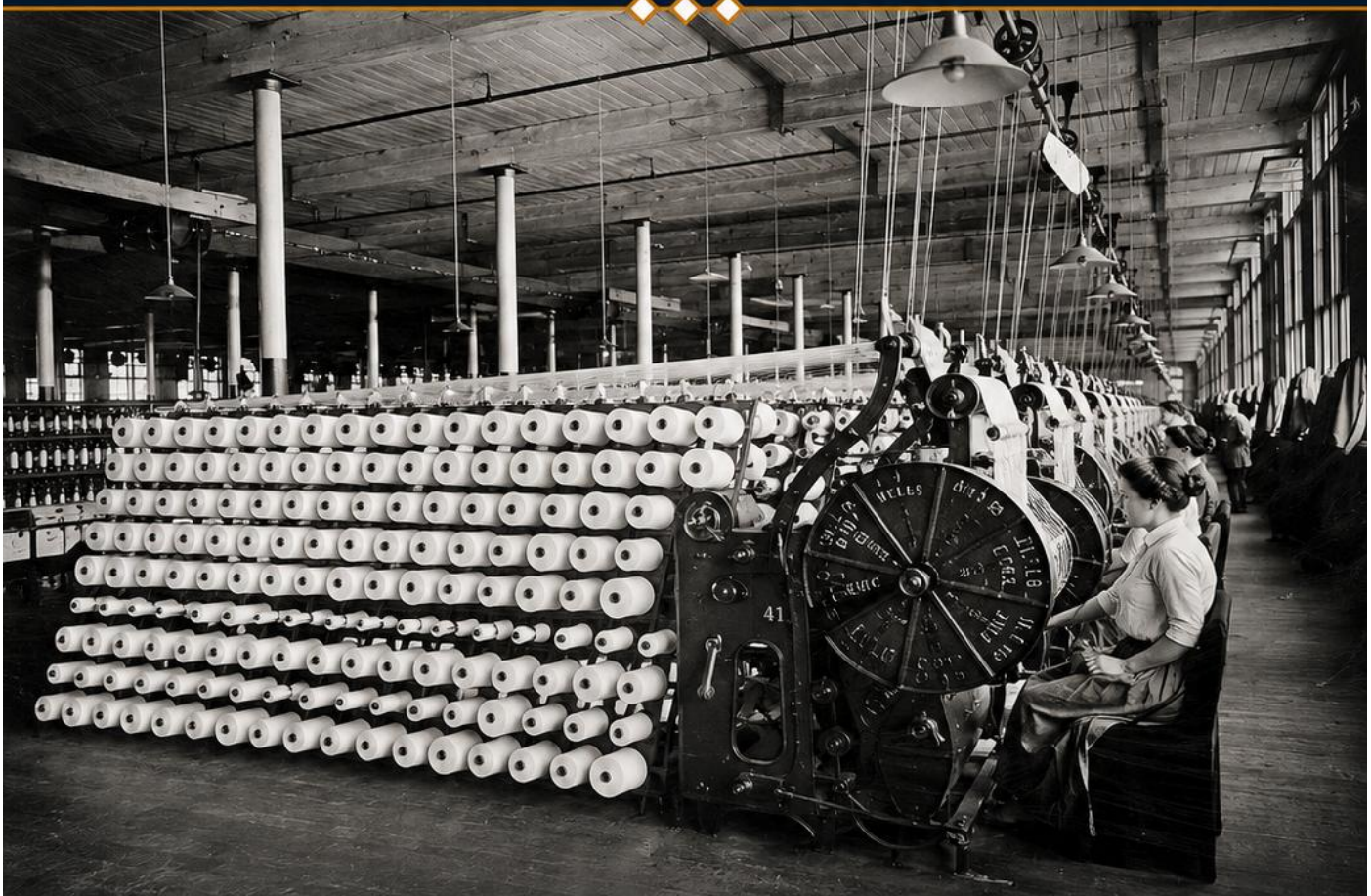
Lubbock rain reinforces a careful taper through maturity.

Weather: local airport daily summaries, Sept. 12–18, 2026. Field context: Pima Growers intelligence. Planning requirements are screening values, not irrigation prescriptions.

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WEST TEXAS FIELD UPDATE

WEEK ENDING 9-18-26






WEST TEXAS FIELD SUMMARY

The West Texas Pima crop is progressing ahead of schedule, supported by warmer-than-average temperatures and less-than-average rainfall. Fields range from 21 to 26 nodes, with 20% to 45% open bolls.

For many growers, skip-row plantings have proved valuable for managing dry conditions with limited irrigation capacity.

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

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

TRANSPARENCY

It is the industry's pioneering end-to-end traceability, transparency, and authentication platform that will provide Supima brand/retail partners true product credibility and insights.

ACCOUNTABILITY

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

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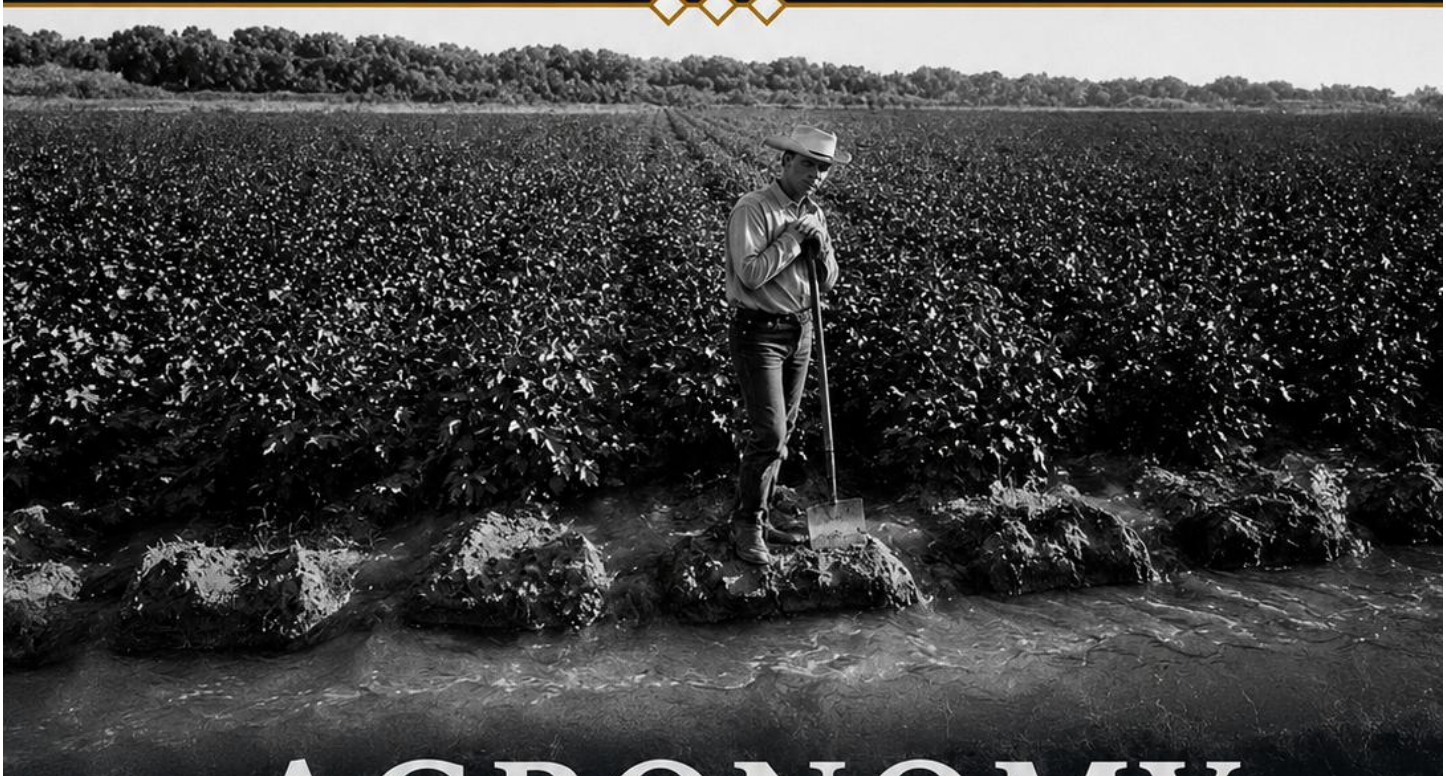
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PIMA FACTS

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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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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 DEFOLIATION

Timing, Physiology and Harvest-Aid Decisions for American Pima

A mature-crop decision—not a calendar decision.

REPORT DATE 9-18-26



The Defoliation Decision: Verify Three Signals

Harvest aids accelerate natural abscission and boll opening; they do not finish fiber development. A field should be judged plant by plant and zone by zone, using the mature, harvestable boll population.

1. OPEN BOLLS

40–60%

Common starting range in Texas guidance. Use the harvestable boll population, not merely visible open bolls.

2. NACB

≤4

Nodes above cracked boll: Texas guidance identifies about 4 NACB as safe for defoliation.

3. KNIFE TEST

MATURE SEED

Cut upper harvestable bolls: dark seed coat, little or no jelly, firm cut and lint that strings when opened.

What the Plant Is Doing

Leaf drop is controlled through an abscission layer at the leaf petiole. Harvest aids either stimulate ethylene-driven abscission, open mature bolls, suppress regrowth or rapidly desiccate tissue. Cool, dry or drought-toughened plants respond more slowly; good canopy coverage is essential.

Pima-specific maturity note

UC guidance identifies Pima as slower to mature than Acala/Upland and commonly uses 3 NACB as the Pima harvest-aid threshold. Use this tighter Pima maturity check alongside the knife test and field variability—particularly where late fruit or uneven irrigation has extended boll fill.

Sources: Texas A&M AgriLife, 2021 Texas High Plains Cotton Harvest-Aid Guide; UC ANR, Harvest Aid Materials and Practices for California Cotton; University of Arizona, Managemer

HARVEST-AID TECHNICAL REFERENCE

Rates, harvest restrictions and relative activity — use the product label and local requirements as the controlling auth

Rotational Crop Restrictions

Small-grain re-crop intervals shown below are Extension reference guidance. Confirm the exact product label before planting.

HARVEST AID	SMALL-GRAIN RE-CROP INTERVAL
Thidiazuron	14 days
Ginstar / Cutout / Adios	1 month / 1 month / 2 months
Folex 6; Aim; Display; Reviton; Sharpen; Para	None quat
ETX	1 day
Finish 6 Pro; Ethephon	1 month

Pima field reminder

Do not let a cleanup choice override maturity. Confirm Pima maturity with NACB, boll opening and the knife test before any desiccation-oriented pass.

Labeled Use and Relative Harvest-Aid Activity

Activity scores are relative—not performance guarantees. Cool, dry or drought-stressed cotton may require more time and can respond differently.

HARVEST AID	BROADCAST RATE/ACRE	MAX USE SEASON	RAINFALL HOURS	PHI DAYS	MIN TEMP.	MATURE LEAVES	JUVENILE LEAVES	REGROWTH PREVENTION	BOLL OPENING
Thidiazuron SC	1.6–6.4 oz	9.6 oz	24	5	65°F	Excellent	Excellent	Excellent	None
Ginstar/Cutout/Adios	6.4–16 oz	16 oz	12	5	60°F	Excellent	Excellent	Excellent	None
Folex 6	16–24 oz	24 oz	1	7	60°F	Excellent	Fair	Poor	None
Aim	0.5–1.6 oz	3.2 oz	8	7	55°F	Excellent	Excellent	Poor	None
Display	1.0 oz	2 oz	8	7	55°F	Excellent	Excellent	Poor	None
ETX	0.9–1.7 oz	5.5 oz	1	7	55°F	Excellent	Excellent	Poor	None
Reviton	1.0–2.0 oz	6 oz	1	10	55°F	Excellent	Excellent	Poor	None
Sharpen	2.0 oz	2 oz	1	5	55°F	Excellent	Excellent	Poor	None
Ethephon	21–42 oz	42 oz	6	7	60°F	Fair	Poor	Fair	Excellent
Finish 6 Pro	21–42 oz	42 oz	6	7	60°F	Excellent	Poor	Fair	Excellent
DESICCANTS									
Paraquat	3.1–32 oz	32 oz	30 min.	3	55°F	Fair	Excellent	Poor	Fair
Sodium chlorate	4.5 lb ai	N/A	24	7	55°F	Fair	Fair	Poor	None

How to use this page

1. Confirm maturity before product selection. 2. Select for the limiting condition—green leaf, regrowth or boll opening. 3. Adj

Coverage and environmental response matter as much as chemistry.

Harvest aids have limited mobility. Cooler temperatures reduce plant metabolism and hormonal activity; drought-stressed

Source layout and reference values: University of Tennessee W376, Cotton Defoliation Guide; Texas A&M AgriLife 2021 High Plains Cotton Harvest-Aid Guide. Educational reference only; always rea

DEFOLIATION PROGRAM SELECTION GUIDE

A technical framework for matching temperature, regrowth potential and pass strategy to harvest-aid selection.

ERENCE PROGRAMS ONLY — PRODUCT LABELS, LOCAL REGULATIONS AND CROP MATURITY CONTROL FINAL SELECTI

CATEGORY 1 — WARM TEMPERATURES; HIGH REGROWTH POTENTIAL; TWO-PASS

- Thidiazuron 2–3 oz/A + boll opener 10–16 oz/A; follow with Folex 6 EC 6–8 oz/A or PPO + boll opener 16–24 oz/A.
- Thidiazuron 2–3 oz/A + Folex 6 EC 4–6 oz/A + boll opener 16 oz/A; follow with Folex or PPO + boll opener.
- Ginstar/Cutout/Adios 2–4 oz/A + boll opener 10–16 oz/A; follow with Folex or PPO + boll opener.

CATEGORY 2 — WARM TEMPERATURES; HIGH REGROWTH POTENTIAL; ONE-PASS I

- Thidiazuron 2–3 oz/A + boll opener 21–32 oz/A.
- Thidiazuron 2–3 oz/A + Folex 6 EC 4 oz/A + boll opener 21–32 oz/A; or Ginstar/Cutout/Adios 2–4 oz/A + boll opener 21–32 oz/

CATEGORY 3 — WARM TEMPERATURES; LOW REGROWTH POTENTIAL; TWO-PASS P

- Thidiazuron 2 oz/A + Folex 6 EC 4–6 oz/A + boll opener 21 oz/A; follow with Folex or PPO + boll opener 16–21 oz/A.
- Thidiazuron 2 oz/A + boll opener 16–21 oz/A; follow with Folex 6 EC 6–8 oz/A or PPO + boll opener 16–21 oz/A.
- Folex 6 EC 6–8 oz/A + boll opener 16–21 oz/A; follow with PPO + boll opener 16–21 oz/A.

CATEGORY 4 — WARM TEMPERATURES; LOW REGROWTH POTENTIAL; ONE-PASS P

- Thidiazuron 2 oz/A + Folex 6 EC 4–6 oz/A + boll opener 21–32 oz/A.
- Folex 6 EC 6–8 oz/A + boll opener 21–32 oz/A; or Ginstar/Cutout/Adios 4–6 oz/A + boll opener 21–32 oz/A.

CATEGORY 5 — COOLER TEMPERATURES; TWO-PASS PROGRAM

- Folex 6 EC 10–16 oz/A + boll opener 16–21 oz/A; follow with Folex 6 EC 10–16 oz/A or PPO + boll opener 16–21 oz/A.
- Ginstar/Cutout/Adios 6–9 oz/A + boll opener 16–21 oz/A; follow with Folex or PPO + boll opener 16–24 oz/A.

CATEGORY 6 — COOLER TEMPERATURES; ONE-PASS PROGRAM

- Folex 6 EC 10–16 oz/A + boll opener 24–42 oz/A; or Ginstar/Cutout/Adios 6–9 oz/A + boll opener 24–42 oz/A.

How to use this guide in Pima

Choose the category only after confirming Pima maturity. Cooler conditions increase response time; warm conditions can inc

PIMA CAUTION

Do not use program selection to rush immature bolls. Pima's longer maturity pattern makes the knife test and field variability

Reference: University of Tennessee Extension W376 Cotton Defoliation Guide. Rates/formulations shown are educational references; read and follow the current pesticide label.

WEATHER, PLANT CONDITION & HARVEST TIMI

Harvest aids work through the plant. The forecast and the crop's condition determine how the program should l

The 3–5 day weather window controls response.

High temperature, sunlight and relative humidity increase activity. Night temperatures above 60°F are particularly in

Weather-Driven Program Choices

STABLE, WARM FORECAST

- Clear skies and nights above 60°F favor good defoliation and boll opening.
- Use less harsh products and lower label rates where maturity and coverage allow.
- Stable conditions make product and rate selection more predictable.

COOL, CLOUDY OR UNSTABLE

- Cool nights and cloud cover slow activity.
- More aggressive products/higher label rates may be needed, with additional response time.
- If a major front is expected, consider waiting until it passes and conditions stabilize.

Rain, Frost and Boll Opening

Avoid applying ahead of substantial rainfall: water entering cracked bolls can increase hard lock and boll rot. Begin the boll-opening process while warm weather remains—typically no later than 10 days before the area's average first frost date. If a hard freeze is imminent, apply allowed ethephon 2–3 days before the event.

Freeze-risk principle

Boll opening requires suture development. A hard freeze ends boll-opening activity; bolls can freeze shut before sutures de

Plant Condition Changes the Program

EASIER TO DEFOLIATE

Mature, well-fruited, uniform plants that have cut out without drought stress generally have few juvenile leaves and have already shed lower mainstem leaves. These active plants form abscission zones with lower rates.

HARDER TO DEFOLIATE

Drought-stressed plants have thicker cuticles and less physiological activity. Heavy late N, irrigation or foliar inputs can retain lower leaves. A midseason drought followed by rain can trigger juvenile regrowth and require multiple passes.

Timing applications in front of the picker

Do not defoliate every acre at once. Apply 10–14 days ahead of anticipated harvest: leaf drop begins in roughly four days and

Source material provided by user; adapted from Tennessee cotton defoliation guidance. Current product labels and local Extension guidance control final decisions.

PIMA-SPECIFIC FIELD EXECUTION

Protect premium fiber by measuring maturity precisely, then adapting the program to weather and field va

The Pima difference

Pima generally takes longer to mature than Acala/Upland. UC California guidance places Pima harvest-aid timing at 3 NACB, versus 4 NACB for Acala/Upland. This is a maturity safeguard—not a substitute for cutting upper harvestable bolls or reviewing the field's maturity distribution.

Field-by-Field Risk Assessment

1. MATURITY

- Count NACB and open bolls
- Cut upper harvestable bolls
- Check multiple field zones
- Protect late-set fruit where it remains economic

2. WEATHER

- Warmth supports response
- Cool nights slow hormonal programs and abscission
- Drought-hardened foliage is harder to defoliate

3. HARVEST PLAN

- Match spray timing to picker or stripper capacity
- Prevent weathering and stain
- Build in time for full response before the harvest window

Regional Considerations Across the American Pima Belt

REGION	PRIMARY DEFOLIATION ISSUE	MANAGEMENT EMPHASIS
California	Long-season Pima maturity; possible late fruit	Use the 3-NACB Pima check; verify upper bolls with the knife test before moving.
Arizona	Heat and late irrigation can prolong activity	Avoid late water/N that encourages regro balance clean-up with mature-boll protect
New Mexico	Cooler fall conditions and variable maturity	Allow additional time; evaluate response l a second pass and follow local labels.
West Texas	Weather risk and stripper-harvest logistics	Use maturity checks, coverage and a plan two-pass sequence where conditions justi

Bottom line

The best harvest-aid program is the one applied to a mature crop, with sufficient coverage and enough time to work. I

Sources: Texas A&M AgriLife, 2021 Texas High Plains Cotton Harvest-Aid Guide; UC ANR, Harvest Aid Materials and Practices for California Cotton; UC IPM cotton guidelines; University of Arizona, M

PIMA GROWERS

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.

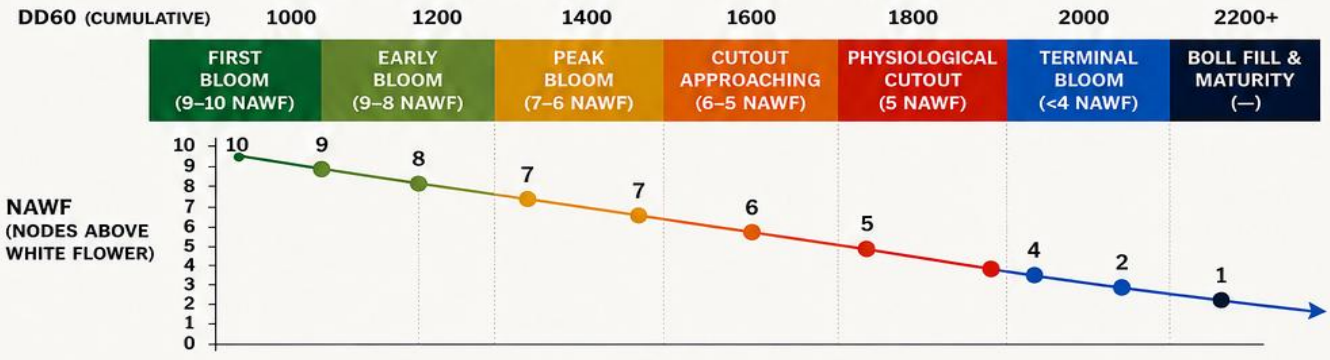
> **"DD60 measures the season. NAWF measures the crop."**

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

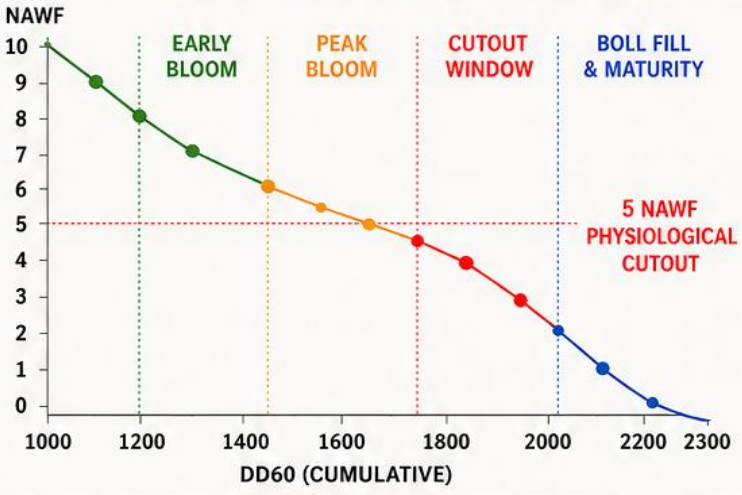


DD60 / NAWF BENCHMARK GUIDE

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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Mid-Week Market Brief

IDEAS
PEOPLE
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A STRONGER
TOMORROW

VOL. I • NO. 17 | NEWS AND INSIGHT FOR THE TEXTILES & APPAREL TRADE | WEDNESDAY, SEPTEMBER 16, 2026

CONSUMERS COME BACK — BUT APPAREL STILL HAS TO EARN THE SALE

August U.S. retail sales rebounded 1.2% from July, beating expectations and reversing July's decline. Core retail sales rose 1.4%. The consumer is still spending, but price sensitivity remains high as August CPI held at 3.4% year over year. For apparel, the week's company news shows the same split: some retailers are finding growth while others are paying for inventory and merchandising mistakes.



THE WEEK'S READ

- August retail sales rebound 1.2%.
- Primark finally moves toward home delivery.
- American Eagle faces margin and inventory pressure.
- Inditex targets more U.S. growth.
- U.S. textile & apparel exports fall 6.6%.

+1.2%	+1.4%	3.4%	-6.6%	10%	-3%
RETAIL SALES	**CORE SALES**	**U.S. CPI**	**U.S. EXPORTS**	**GAP COMPS**	**PRIMARK**
August month over month.	Strong underlying spending.	August year over year.	Textile & apparel, Jan.–July.	Recent Gap brand comparable-sales growth.	Expected Q4 same-store sales.

FIVE STORIES TO WATCH

01 CONSUMER

August U.S. retail sales rose 1.2%, while core sales increased 1.4%. Back-to-school spending helped bring shoppers back.



02 PRIMARK

Primark plans home delivery in Britain, ending its long resistance to direct-to-consumer shipping as online economics improve.



03 AMERICAN EAGLE

The retailer faces weak core-brand demand, excess inventory and tariff-related cost pressure. Inventory costs were up 14%.



04 INDITEX

The Zara owner is looking to the U.S. for its next phase of growth, with new and updated stores planned across several markets.



05 TRADE

U.S. textile and apparel exports fell 6.6% to about $12.16B in January–July, according to OTEXA data reported this week.



BOTTOM LINE

Consumers showed up in August, but that does not mean the pressure is gone. Inflation is still running at 3.4%, retailers are watching inventory closely, and apparel brands continue to split between those with product momentum and those forced into promotions. Demand is there. It is simply less forgiving.



BOB'S TAKE

The retail number is encouraging, but apparel companies should not mistake a stronger month for an easier market. Consumers will spend when the product and price make sense. That puts the burden back where it belongs: merchandise, sourcing and execution.

Sources: Reuters • OTEXA • BLS • U.S. Census • Data through Sept. 16, 2026

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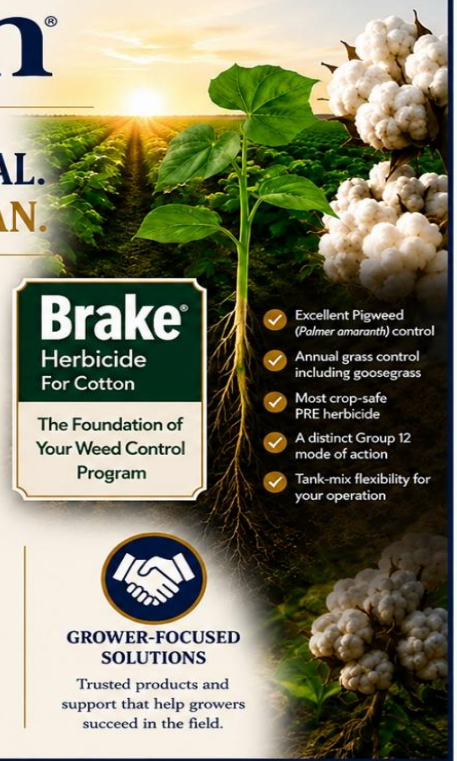
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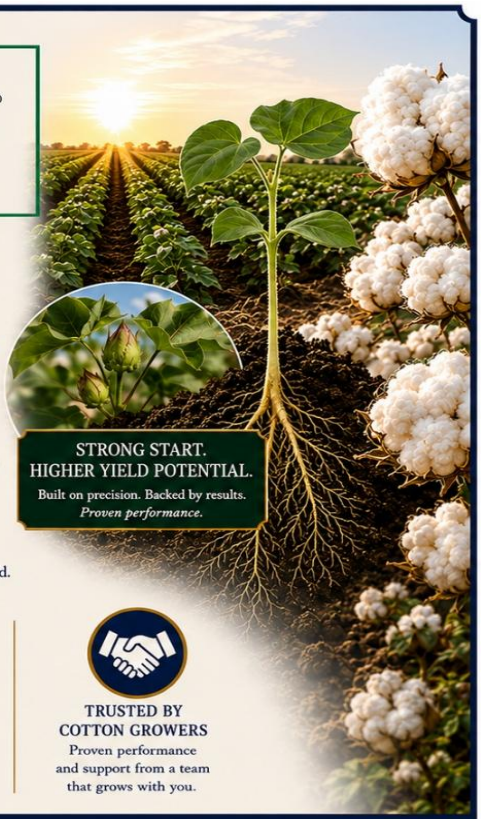
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AgLogic® helps cotton growers protect yield potential from the very beginning of the season. Through broad-spectrum control of thrips, nematodes, resistance, and starter, AgLogic provides the foundation for stronger plants established, improved vigor,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

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Stronger plant establishment for better stands and improved growth.

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Broad-spectrum control of key pests that rob yield potential.

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

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

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

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- Connections with industry leaders and collaborators
- Strengthening the future of American Pima cotton

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- Direct link to your company website
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- Visibility among growers, merchants, textile manufacturers, brands, retailers and industry stakeholders

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