THE PIMA FIELD & MARKET JOURNAL PIMA GROWERS

PIMA GROWERS

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

WEEK ENDING OCT. 9, 2026



THE REAL VALUE OF SUPIMA® PRODUCTS

Why American Pima cotton deserves a greater share.

VALUE CAPTURE

SUPIMA® PRODUCTS DESERVE A GREATER SHARE

In a premium $100 polo, estimated raw Pima value is $0.99 - less than 1% of retail value.

Read the lead feature on the value gap and the case for a stronger fiber share.

PIMA VALUE NOTES

THE VALUE / RETAIL GAP

At $1.65/lb, the raw Pima value in a $100 polo is $0.99. A 20¢/lb increase adds only $0.12.

Premium value is created across the entire supply chain.

FEATURED IN THIS ISSUE

THE REAL VALUE OF SUPIMA® PRODUCTS
STATE OF AMERICAN PIMA
WEEKLY CROP PROGRESS
CUMULATIVE GDD60 BY LOCATION
FAR WEST TEXAS / EL PASO UPDATE
GLOBAL MARKET WEEK IN REVIEW

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

MEMBERSHIP

- Individual Partner
- Small Business Partner
- Corporate Partner

ADVERTISING & PARTNERSHIPS

- Journal Sponsorships
- Feature Articles
- Industry Partner Pages

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WHERE THE CROP FINISHES

Defoliation, Maturity and the Final Protection of Pima Quality

The crop's functional finish is defined in the field - not by the first freeze date on a calendar.

WEEK ENDING OCTOBER 9, 2026



PIMA PERSPECTIVE

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

Across the U.S. crop, boll opening remains slightly behind normal, especially across the Southwest, including Texas. Harvest progress is estimated at 23%, compared with a five-year average of 21%.

The weighted share of the crop rated good to excellent fell to a season low of 32.7%, down from 35.4% the prior week. Virtually every state registered a lower rating; Arizona was the lone exception.

The October USDA update projects American Pima production at 383,000 bales, down 9,000 bales from September. Harvested acreage is 136,700 acres and average yield is 1,345 pounds per acre.

California is estimated at 290,000 bales, Texas at 45,000, Arizona at 30,000 and New Mexico at 18,000. The lower California and Texas outlook tightens supply, partly offset by New Mexico.

KEY TAKEAWAYS

HARVEST PROGRESS
U.S. harvest: 23%; five-year average: 21%.

CROP CONDITION
Good to excellent: 32.7%, down 2.7 points.

ARIZONA
The only state not declining last week.

PIMA SUPPLY
October output: 383,000 bales, down 9,000.

PIMA MARKET

SIGNAL	CURRENT READING
Pima landed Southeast Asia	$1.88/lb
Pima current spot	$1.73/lb
Pima organic trading	$2.30/lb
Pima/Upland current spread	$0.92/lb
Upland current spot	$0.8038/lb
2026/27 projected ending stocks	92,000 bales

Defoliate on crop readiness, protect mature-boll quality and preserve the final value signal.

Where the crop finishes defines how the Pima bale enters the market.

Sources: USDA Crop Progress data through Oct. 4, 2026; USDA Crop Production, October 2026; Pima Field & Market Journal.



THE REAL VALUE OF SUPIMA® PRODUCTS

WHY AMERICAN PIMA COTTON DESERVES A GREATER SHARE

WEEK ENDING OCTOBER 9, 2026

American Pima cotton is prized for its strength, softness, and long staple length. Yet in a premium polo, the estimated value of the raw cotton is a small share of the retail price. The example below uses a $1.65/lb Pima value assumption and a premium-market $100 retail price.

0.60 lb	$0.99	0.99%
ESTIMATED COTTON IN POLO	ESTIMATED RAW PIMA VALUE	SHARE OF $100 RETAIL PRICE

THE VALUE OF PIMA COTTON IN EVERYDAY SUPIMA® PRODUCTS

PRODUCT	EST. COTTON	RAW VALUE[1]	RETAIL PRICE	VALUE / RETAIL
Supima Polo	0.60 lb	$0.99	$100	0.99%
Supima Tee Shirt	0.45 lb	$0.74	$100	0.74%
Supima Long Sleeve Shirt	0.60 lb	$0.99	$130	0.76%
Premium Towel Set (6-piece)	3.50 lb	$5.78	$140	4.13%
King Supima Sheet Set	5.50 lb	$9.08	$600	1.51%

IF PIMA VALUE RISES 20¢/LB

At retail, a 20¢/lb increase adds only pennies.

PRODUCT	ADDED COST	% OF RETAIL
Polo ($100)	$0.12	0.12%
Tee ($100)	$0.09	0.09%
Long sleeve ($130)	$0.12	0.09%
Towel set ($140)	$0.70	0.50%
King sheet set ($600)	$1.10	0.18%

WHERE THE $100 RETAIL DOLLAR GOES

On the $100 polo example, about $0.99 is the estimated raw cotton value; the remaining $99.01 reflects the broader supply chain and retail value.

$0.99 TO THE GROWER | 0.99%

$99.01 SUPPLY CHAIN & RETAIL | 99.01%

THE BOTTOM LINE

A 20¢/lb increase adds just $0.12 to the estimated cotton value in a $100 polo, equal to about 0.12% of its retail price.

[1] Estimated raw cotton value uses $1.65/lb and estimated product cotton weights.

Retail benchmarks: Brooks Brothers polo/dress shirt; Sunspel tee; Lacoste Home towel set; Bloomingdale's Hudson Park sheets. List prices reviewed Oct. 10, 2026.

EST. 2018

PIMA GROWERS

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 OCTOBER 9, 2026

EXECUTIVE SUMMARY

American Pima pricing firmed during the week, with landed Southeast Asia at $1.88/lb and spot at $1.73/lb. The current Pima-to-Upland spread is 93 cents/lb. PSF at 58 cents/lb and WTI at $91.66/bbl keep the competitive backdrop cost-sensitive.

Supima's Week 9 report showed new sales of 3.3K RB, with total commitments reaching 194.4K RB (+56.9% YoY). Weekly exports were 2.9K RB; shipped-to-date is 59.3K RB (30.5% of commitments), compared with 49.6% last year. Outstanding sales are 135.0K RB.

- **Total Commitments:** 194.4K running bales | +56.9% YoY
- **Weekly Exports:** 2.9K RB | prior week 9.3K
- **Current Pima/Upland Spread:** $0.93/lb

AMERICAN PIMA VALUE POSITION

+$0.93/LB

PREMIUM OVER UPLAND

Long-Staple Price Ratio: 215%

Five-Year Average Spread: $0.8200/lb

NEGATIVE · SLIGHTLY IMPROVED WEEKLY

Primary Risks: Rates, Energy Costs & End-Demand Recovery

FIBER MARKET BENCHMARKS | PCIA INDICATIONS

INDICATOR	CURRENT	COMPARISON / SIGNAL
American Pima Landed Southeast Asia	**$1.88**	Premium
American Pima Spot	**$1.73**	Premium
Organic Pima - Current Trading	**$2.30**	Premium
Giza 94 Landed Southeast Asia - Egypt	**$1.46**	Neutral
Israel ELS Landed Southeast Asia - Israel	**$1.85**	Premium
Xinjiang Long Staple Type 137 - China	**$1.82**	Premium
U.S. Pima - Prior 5-Year Average	**$1.65**	Reference
Upland - Spot	**80.38 cents/lb**	Neutral
Upland - Prior 5-Year Average	**83.00 cents/lb**	Reference
Pima/Upland Prior 5-Year Spread	**$0.8200**	Reference
Current Pima/Upland Spread	**$0.93**	Favorable
WTI Crude Oil	**$91.66/bbl**	External cost risk
Polyester Staple Fiber	**~$0.58/lb**	Competitive headwind

PIMA MONITOR

	2024 ACTUAL	2025 / 26	2026 / 27 EST.
Acres	200,500	142,000	137,000
Production (Bales)	471,000	388,000	383,000
Ending Stocks (Bales)	—	105,000	92,000

SUPIMA WEEK 9 EXPORT SALES

Total Commitments	194.4K
Net Sales (3.3 gross / 1.7K buy-back)	3.3K
Weekly Exports	2.9K
Shipped to Date	59.3K / 30.5%
Outstanding Sales	135.0K

COMMITMENTS	ACRES VS 2024	PRODUCTION VS 2024	COMMITMENTS SHIPPED
+56.9% YoY	-31.7%	-18.7%	30.5%

SUPIMA WEEK 9 TRADE DETAIL | USDA EXPORT SALES

NEW SALES BY MARKET	
India	4.3
Indonesia	0.3
Vietnam	0.2
China	0.1
Thailand	0.1
Net Sales	3.3

TOP MARKETS - TOTAL COMMITMENTS	
India	85.0
Vietnam	40.6
Egypt	11.4
China	10.7
Bangladesh	8.5

Sources: Supima Weekly Pima Market Report, Week 9 USDA Export Sales (week ending Oct. 1, 2026); market figures and Pima Monitor supplied for Oct. 9, 2026.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 9 · Ending October 1, 2026 · MY 2026/27 (Aug–Jul)

India Signs for 4.3k as the Book Rebuilds; Shipments Catch Their Breath

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
3.3 k RB	**2.9** k RB	**194.4** k RB	**30.5** %	**135.0k**
▲ 5.3 gross 5.0k less 1.7k buy-back	▼ 6.4 vs 9.3	▲ 56.9% YoY LY 123.9	59.3 of 194.4 · LY 49.6%	▲ 0.4k WoW sales edged past loadings

THIS WEEK IN THE MARKET

New business snapped back, led by the anchor buyer. After the first negative week of the MY, mills signed 5.0k RB gross and 3.3k net. India took 4.3k of it — its largest booking since week 6 — rebuilding the total book to 194.4k RB and lifting India's share to a season-high 43.7% (85.0k).

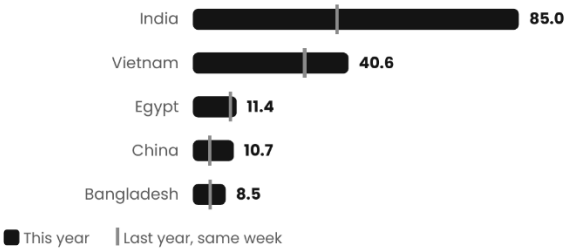
Shipments paused after two heavy weeks. Exports eased to 2.9k RB following loadings of 11.7k and 9.3k. Accumulated exports of 59.3k slipped 3.6% behind last year — the prior-year comp shipped 7.3k that same week — and 30.5% of the book has now shipped versus 49.6% a year ago. The lead will likely keep trading hands around last year's lumpy weekly comps.

Buy-backs continued at a smaller scale. Egypt returned roughly 1.3k of the week's 1.7k cancellations, trimming its book to 11.4k. Season-to-date buy-backs total 6.6k — 3.4% of commitments — against 84.7k of net new business. Vietnam (40.6k) and China (10.7k) held their positions; Bangladesh stayed fifth at 8.5k.

- The book's YoY lead narrowed to +56.9% (+70.5k) — not on Supima weakness but on last year's October surge entering the comparison; the absolute book grew 3.3k this week.
- Pace coverage stands at 1.9× (6.1k/wk 2-week average vs 3.1k/wk required) — comfortable, though another quiet loading week would put it back on the watch list.
- Egypt joined Peru and India on the cancellation ledger; 6.6k returned over four weeks remains modest, but the pattern of position-trimming is now broader than one buyer.

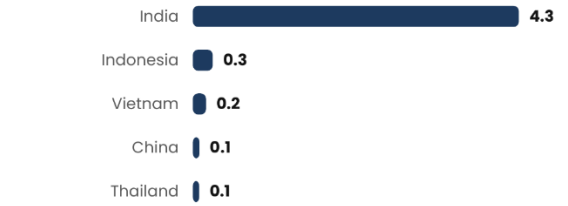
TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



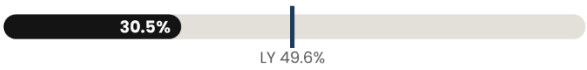
WEEK 9 NEW SALES BY MARKET

k RB



SEASON SHIPMENT PROGRESS

% of commitments shipped



With 43 weeks left, clearing 135.0k RB of outstanding sales requires ~3.1k RB/wk against a trailing 2-week pace of 6.1k — 1.9× coverage. Harvest-season loadings are inherently lumpy; the two-week average remains the better read than any single week's 2.9k or 11.7k print.

SUPIMA AT DTC RETAIL — POWERED BY PARTICL

Particl DTC/e-commerce panel · market index: "Supima" tag, monthly · brand cards: Supima-titled, weekly, wk ending October 3, 2026

Nordstrom's Supima-titled program settled to $1.06M across 85 styles (–28.0% WoW, 19.7k units) as the early-fall surge normalized — the short-sleeve crew led at $117k and a long-sleeve Supima polo emerged as a $84k seller. Original Favorites held steady at $56.0k. The market index reads $223M trailing-twelve-month across 81 brands; September closed near $14.2M, about 5% below a strong year-ago September, pending panel revisions.

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® · 85 SKUS



$1.06M

▼ 28.0% WoW

19,717 units

SS crew $117k led; LS polo $84k is the fall assortment's newest six-figure-pace style

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 Oct 1, 2026); Particl retail intelligence — DTC e-commerce only, excludes wholesale, offline, and several of the largest Supima users (e.g., UNIQLO). DTC windows: Sep 27–Oct 3 vs Sep 20–26, 2026. Forecast = required weekly export pace vs trailing 2-week average. Prior-MY comparisons from USDA prior-year columns.

GLOBAL MARKET WEEK IN REVIEW

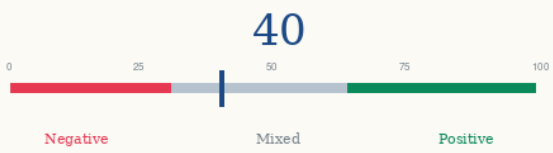
Outside Markets Influencing American Pima Cotton

WEEK ENDING OCTOBER 9, 2026

Executive Summary

American Pima pricing firmed during the week, with landed Southeast Asia at $1.88/lb and spot at $1.73/lb. The current Pima/Upland spread is 93 cents/lb. PSF at 58 cents/lb and WTI at $91.66/bbl keep the competitive backdrop cost-sensitive.

Pima Market Environment Index



NEGATIVE · SLIGHTLY IMPROVED WEEKLY

Primary Risks: Rates, Energy Costs & End-Demand Recovery

MARKET SNAPSHOT

INDICATOR	OCT. 9 VALUE	MARKET
Pima landed Southeast Asia	**$1.88/lb**	U.S.
Pima spot price	**$1.73/lb**	U.S.
Pima organic trading	**$2.30/lb**	U.S.
ELS Giza 94 landed Southeast Asia	**$1.46/lb**	Egypt
ELS Israel landed Southeast Asia	**$1.85/lb**	Israel
Xinjiang long staple Type 137	**$1.82/lb**	China
U.S. Pima prior 5-year average spot	**$1.65/lb**	
Upland spot price	**$0.8038/lb**	
Upland prior 5-year average spot	**$0.8300/lb**	
Pima/Upland prior 5-year spread	**$0.8200/lb**	
Pima/Upland current spread	**$0.93/lb**	
WTI crude oil	**$91.66/bbl**	
PSF	**$0.58/lb**	

PIMA MONITOR

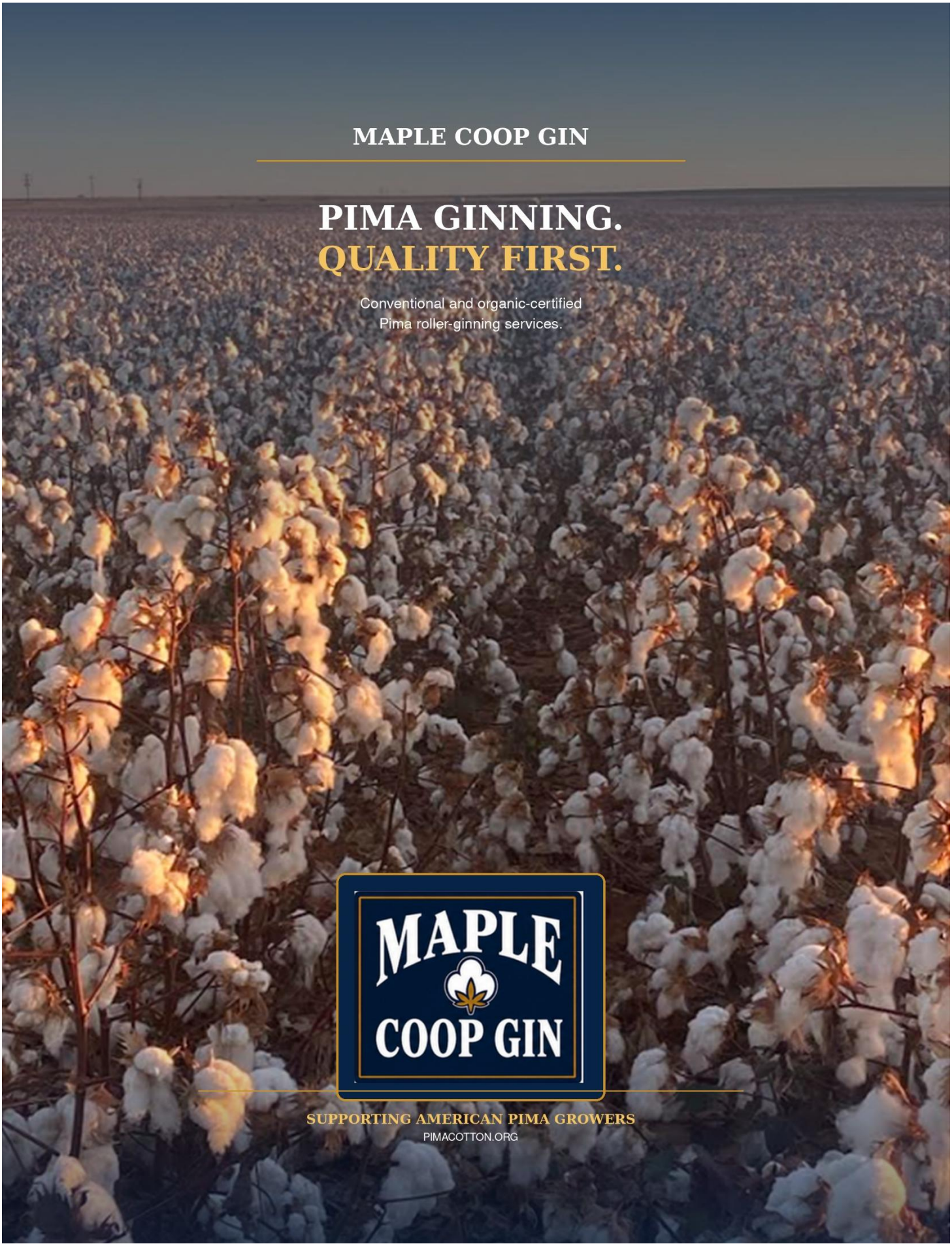
2026 acreage projection	**137,000 acres**	2025: 142,000 | 2024: 200,500
2026 production projection	**383,000 bales**	2025: 388,000 | 2024: 471,000
Ending stocks	**92,000 bales projected**	2025/26: 105,000 bales

WHAT CHANGED THIS WEEK

- Pima landed Southeast Asia advanced to $1.88/lb; Pima spot is $1.73/lb.
- The Pima/Upland current spread is $0.93/lb, above the $0.8200/lb prior five-year average.
- PSF is updated to $0.58/lb; WTI at $91.66/bbl maintains an elevated energy-cost backdrop.
- Projected 2026/27 Pima ending stocks of 92,000 bales are below 2025/26 ending stocks of 105,000 bales.

Source: Market figures and Pima Monitor data supplied for the week ending October 9, 2026.

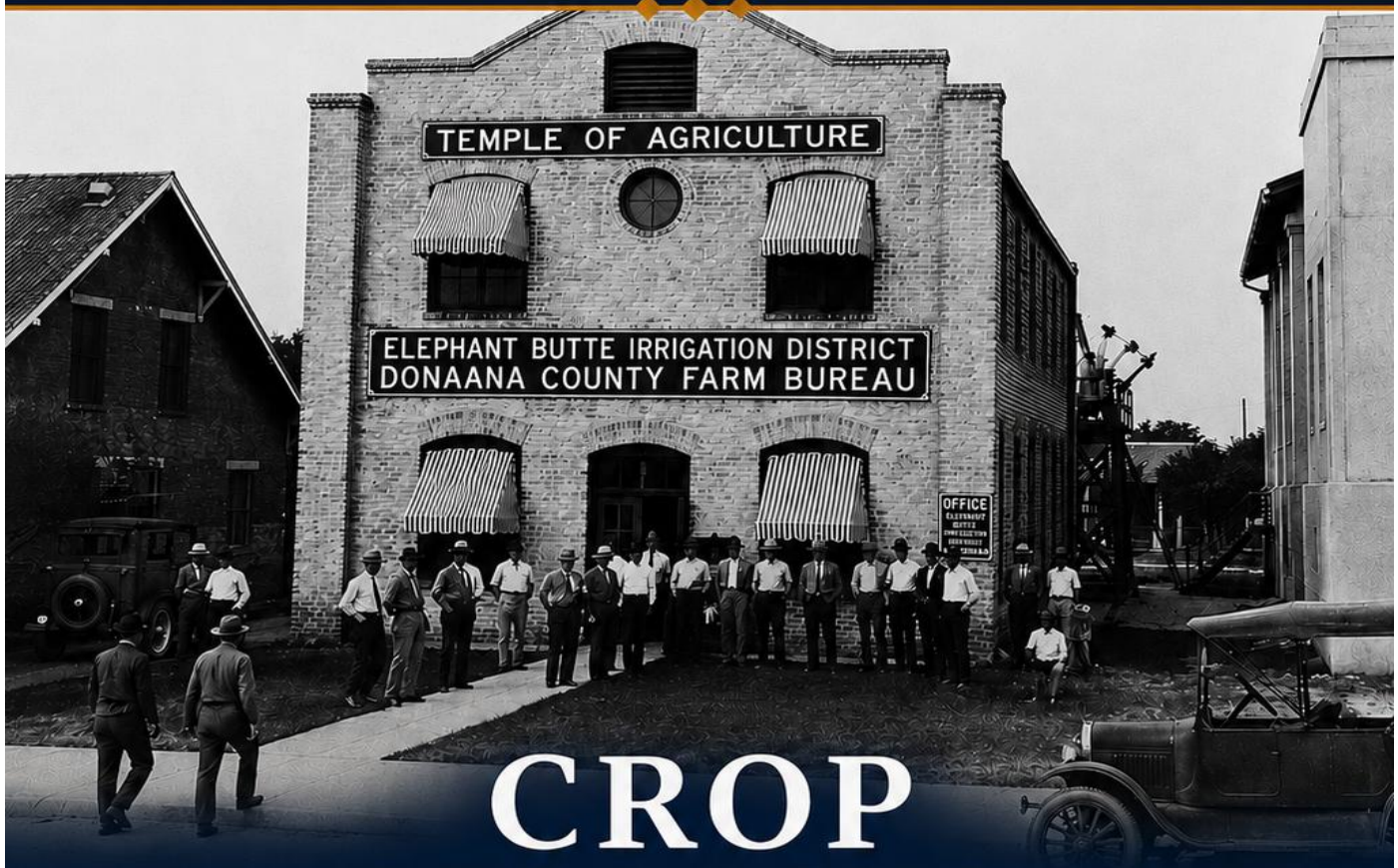

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CROP INTELLIGENCE

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 10-9-26
USDA DATA THROUGH 10-4-26

Executive Field & National Crop Summary

The U.S. crop is a little behind schedule via boll opening, especially in the southwesterrn states, which include Texas. The amount of cotton harvested across the U.S. is judged to be roughly 23% compared to a five-year average of 21%. The weighted average of the crop rated good to excellent fell to a season low of 32.7%—down from 35.4% the week before. Virtually every state had ratings reduced last week—with one exception: Arizona.

U.S. COTTON CONDITION

32.7% G+E

0 100

Stressed Mixed Favorable

CONDITIONS DECLINE THIS WEEK

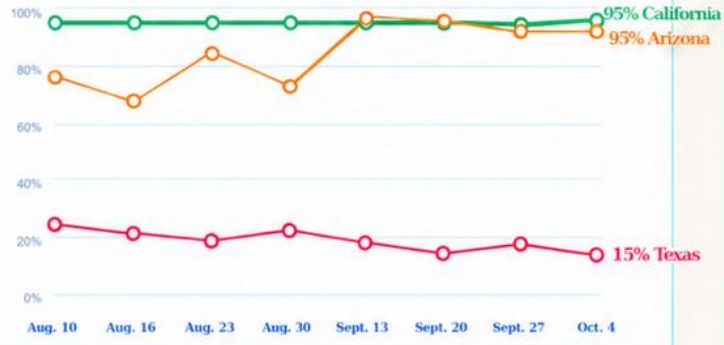
Down 2.7 points week over week.

USDA COTTON CROP PROGRESS SCORECARD

METRIC	CURRENT / PRIOR	WEEKLY CHANGE	CONTEXT
U.S. HARVESTED	23% / 21% 5-YR AVG.	—	U.S. crop progress
GOOD + EXCELLENT	32.7% / 35.4%	DOWN 2.7 PTS	weighted U.S. cotton acreage
ARIZONA	ONLY EXCEPTION	DID NOT DECLINE	state rating
SOUTHWEST	BEHIND VIA BOLL OPENING	—	Texas included

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



U.S. HARVEST: 23%

23% harvested vs. 21% five-year average.

FIVE-YEAR AVERAGE: 21%

U.S. five-year harvest average is 21%.

ARIZONA: ONLY EXCEPTION

Arizona did not decline last week.

PIMA GROWERS INTERPRETATION:

The U.S. crop is a little behind schedule via boll opening, especially in the southwestern states, which include Texas. The amount of cotton harvested across the U.S. is judged to be roughly 23% compared to a five-year average of 21%. The weighted average of the crop rated good to excellent fell to a season low of 32.7%—down from 35.4% the week before. Virtually every state had ratings reduced last week—with one exception: Arizona.

Sources: USDA NASS Crop Progress, week ended Oct. 4 and released Oct. 9, 2026; supplied USDA state condition table and national comparison. Pima Growers field intelligence.

AMERICAN PIMA SUPPLY OUTLOOK

USDA October 2026 Update

October estimates lower supply as California and Texas revisions outweigh gains in New Mexico.

REPORT DATE OCTOBER 9, 2026



EXECUTIVE SUMMARY

USDA's October 2026 estimates project U.S. American Pima production at 383,000 bales, down 9,000 bales from September. Harvested acreage slips 300 acres to 136,700, while average yield declines 31 pounds to 1,345 pounds per harvested acre.

California is revised down 10,000 bales to 290,000 and Texas down 6,000 bales to 45,000. New Mexico rises 7,000 bales to 18,000, while Arizona holds at 30,000. The October report points to a modestly tighter crop, concentrated in California and Texas.

KEY TAKEAWAYS

PRODUCTION —

383,000 bales; down 9,000 from September.

YIELD —

1,345 lbs./acre; down 31 lbs. from September.

REGIONAL SHARE —

California 290,000 bales (76%); Texas 45,000, Arizona 30,000, New Mexico 18,000.

MARKET POSITION —

California and Texas cuts tighten October supply, partly offset by New Mexico.

2026/27 AMERICAN PIMA PRODUCTION ESTIMATE

Region	May Final Acres	March Estimate Acres	August Estimate Acres	September Estimate Acres	October Harvested Acres	Yield lbs.	Production 1,000 bales
PIMA	**142**	**130**	**148**	**142**	**137**	**1,345**	**383**
Arizona	16	15	15	16	15	960	30
California	92	80	95	92	87	1,600	290
New Mexico	13	15	16	13	10	891	18
Texas	21	20	28	21	25	864	45

Source: USDA Crop Production, October 1, 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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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.

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 OCTOBER 9, 2026

Executive Weather Summary

The final reported weather week (Sept. 26–Oct. 2) kept the late-season focus on rain-driven regrowth, harvest access and avoidable fiber-quality exposure. California remained in early harvest and continued defoliation; Arizona, New Mexico and West Texas were in the defoliation setup window. Safford received 1.28 in., Deming 2.26 in., El Paso 0.81 in. and Lubbock 0.84 in. By Oct. 9, U.S. harvest was roughly 23% versus 21% five-year average; weighted good-to-excellent fell to 32.7% from 35.4%.

REGIONAL WEATHER RISK

MODERATE

Lower | Moderate | High | Extreme

Primary Risk: Late rain + regrowth / quality risk

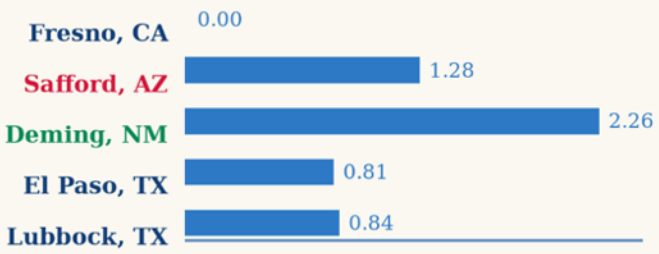
Monitoring: Regrowth, quality and harvest access

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	81–96 / 56–68	0.00 / 0.00	4.54	+96	Early harvest	Field-specific
Safford, AZ	74–95 / 57–65	1.28 / 1.09	6.45	+81	Defoliation setup	0.00
Deming, NM	66–90 / 50–65	2.26 / 1.92	8.11	+50	Defoliation setup	0.00
El Paso, TX	72–90 / 57–66	0.81 / 0.69	9.87	+80	Defoliation setup	0.00
Lubbock, TX	63–89 / 57–66	0.84 / 0.71	11.99	+78	Defoliation setup	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



Observed rainfall (inches)

FINAL-IRRIGATION OUTLOOK

Functional crop end is now the organizing criterion. California is in early harvest and continued defoliation. Arizona, New Mexico and West Texas are finishing defoliation. With the weighted crop rating down to 32.7%, protect maturity and harvest quality rather than extend vegetative activity. Where rain has occurred, monitor for regrowth, field access and avoidable yield or fiber-quality loss before scheduling the next pass.

CALIFORNIA — EARLY HARVEST: Continued defoliation; protect mature-boll quality and harvest readiness.

SOUTHWEST — RAINFALL: Safford and Deming rain warrant regrowth and field-condition checks.

WEST TEXAS — RAINFALL: Rain raises regrowth, access and quality concerns.

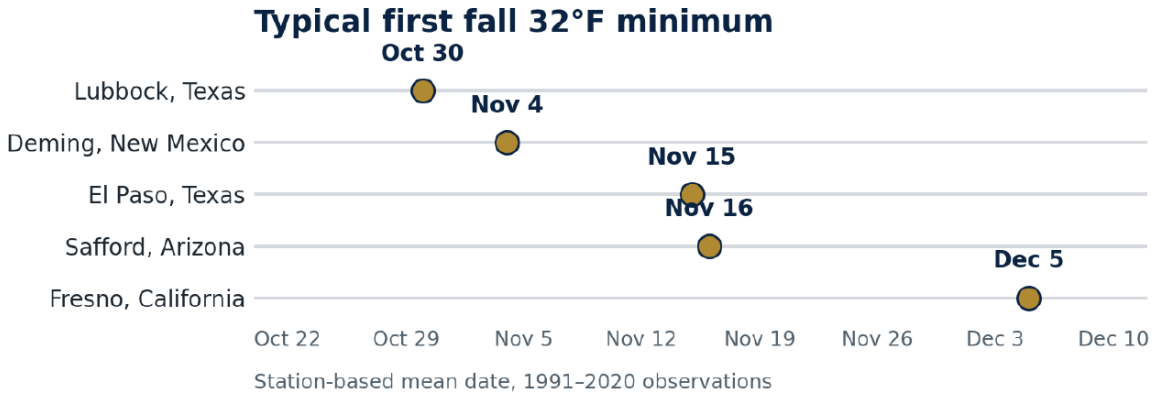
Sources: Station weather observations Sept. 26–Oct. 2, 2026; USDA Crop Progress through Oct. 9, 2026. Planning values are screening values, not irrigation prescriptions.

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CROP INTELLIGENCE | FREEZE AND MATURITY

First Freeze Dates and the Cotton Countdown Clock

The first 32°F morning is the hard edge of risk, but mature-boll progress begins slowing much earlier. Use the regional calendar with daily thermal conditions to identify the real harvest deadline.



TEMPERATURE GUIDE FOR LATE SEASON PIMA

TEMPERATURE	WHAT IT MEANS FOR THE CROP
Daily mean at or below 60°F	No meaningful heat-unit accumulation or crop advancement
Night lows 60–65°F	Growth and boll development slow noticeably
Night lows below 55°F	Very little effective growth; cool stress begins to matter
Below 50°F repeatedly	Chilling stress; development is effectively shut down
32°F or below	Freeze injury; foliage and immature bolls are at real risk
Daytime 75–90°F	Strong cotton growth range
Daytime 90–95°F	Still productive if water status is good; stress risk rises
Sustained 95–100°F plus	Heat stress can reduce fruit retention and boll development

GDD60 QUICK CHECK

70° / 50° → 0 GDD60 | **75° / 55° → 5 GDD60** | **65° / 45° → 0 GDD60**

Bottom line: once the daily average slips to about 60°F or below, cotton is no longer advancing in a meaningful way. Prioritize late fields using immature-boll load, repeated lows below 55°F, daily means near 60°F and a forecast low approaching 32°F.

PIMA GROWERS INTERPRETATION

The regional first-freeze date provides a useful sequence, but it is not a hard field deadline. A late crop in a cold pocket can lose meaningful maturity before the station reaches 32°F; a more advanced crop with favorable heat can safely run later. The decision belongs to the crop, the field and the forecast together.

FIELD CHECKLIST • Immature-boll load • Consecutive lows below 55°F • Daily mean near 60°F • Forecast low approaching 32°F

Sources: NOAA NCEI GHCN-D station observations, 1991–2020; Cotton Incorporated temperature guidance; Pima Growers analysis.

2026 FINAL SEASON SUMMARY

Cumulative GDD60 and Closing Crop Progress Across the American Pima Belt

Final heat-unit tabulation through October 2; crop status through October 9.

YEAR-END REPORT — OCTOBER 9, 2026

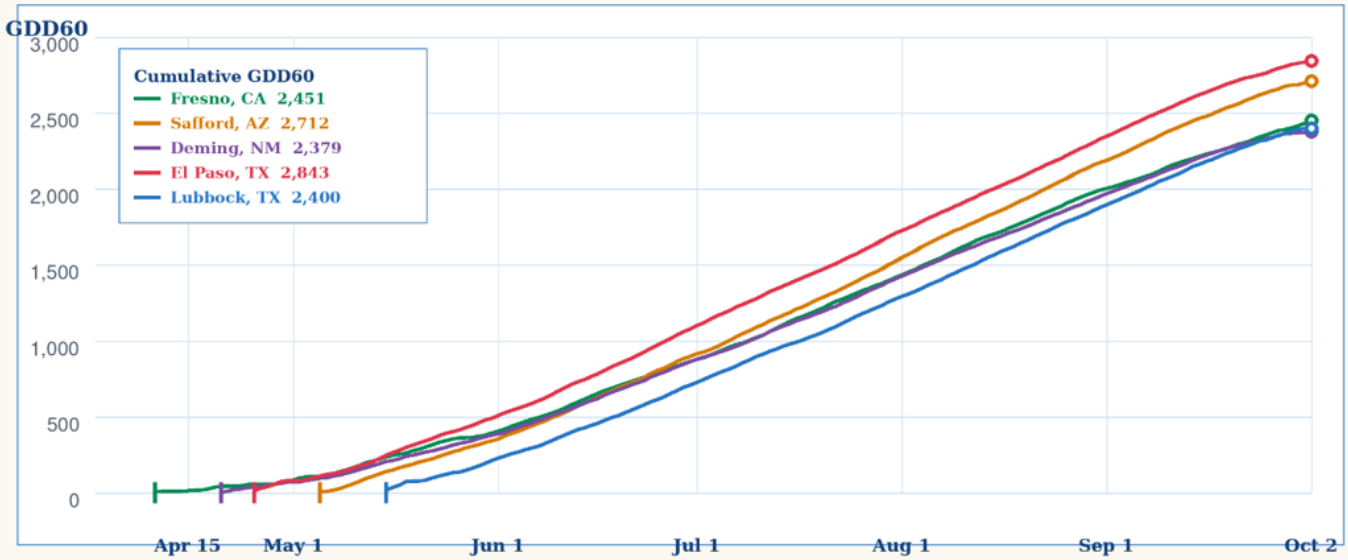
FINAL SEASON SUMMARY

The verified GDD60 series closed Oct. 2, with El Paso leading at 2,843 units, followed by Safford at 2,712. Fresno, Deming and Lubbock finished tightly grouped between 2,379 and 2,451. The tabulation remains a station heat comparison—not a yield, maturity, or irrigation model.

CLOSING CROP POSITION

U.S. cotton harvest reached roughly 23%, ahead of the five-year average of 21%. Weighted crop ratings good to excellent fell to a season low of 32.7%, from 35.4% the prior week. Arizona improved while virtually every other state registered lower ratings.

CUMULATIVE GDD60 — FINAL SEASON TABULATION



Final planting-date adjusted station comparison through Oct. 2. Crop-status reporting was updated separately through Oct. 9.

GDD60 SCORECARD — FINAL TABULATION THROUGH OCTOBER 2

Location / station	Planting date	Cumulative GDD60	Sept. 26-Oct. 2 GDD60	Days in series
Fresno, CA	Apr 10	2,451	+96	176
Safford, AZ	May 5	2,712	+81	151
Deming, NM	Apr 20	2,379	+50	166
El Paso, TX	Apr 25	2,843	+80	161
Lubbock, TX	May 15	2,400	+78	141

PIMA GROWERS YEAR-END INTERPRETATION:

The heat-unit series closes with regional differences clearly established. By Oct. 9, focus had shifted to harvest execution and late-season quality. Harvest was modestly ahead of its five-year pace, while lower ratings reinforced the importance of protecting quality through final harvest and classing. GDD60 values shown above are the final verified Oct. 2 station totals.

Source: Station GDD60 calculation through Oct. 2, 2026; USDA Crop Progress through Oct. 9, 2026. Final seasonal summary prepared by Pima Growers.

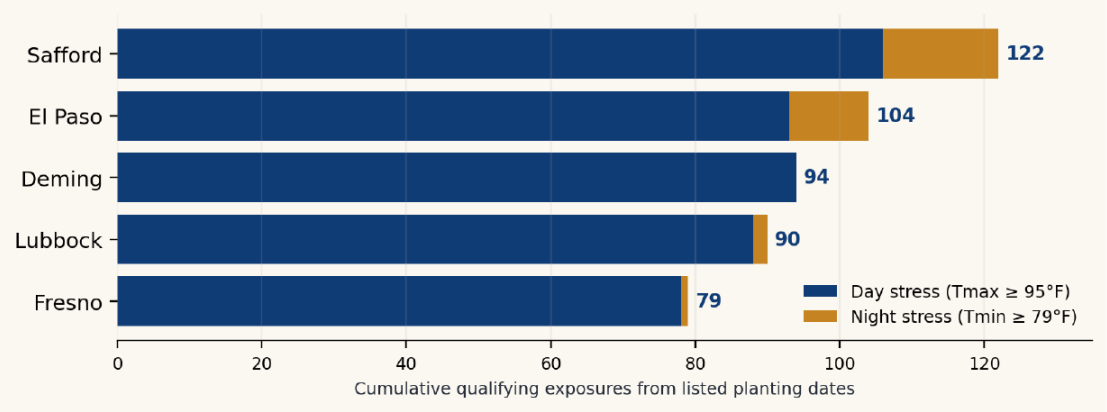
2026 PIMA REGIONAL HEAT EXPOSURE CLOSEOUT

Heat exposure through September 18, 2026, closed at regional defoliation initiation

HEAT DATA Planting through Sept. 18	FUNCTIONAL ENDPOINT Regional defoliation initiation	COMPARISON Matched 2025 annual window

CLOSEOUT SUMMARY

The 2026 heat-exposure tracker is closed as a crop-management record. Defoliation has begun in California and Arizona, so added heat now has limited functional crop consequence. Daytime heat defined the season: Safford recorded 122 points, El Paso 104 and Deming high daytime exposure without qualifying warm nights. These are exposure comparisons, not yield-loss estimates; interpret them with water status, maturity, harvest timing and quality observations.



2026 cumulative heat-exposure screening index

CLOSEOUT DECISION AND REGIONAL READ

Region	Day stress	Night stress	Closeout interpretation
Safford, AZ	**106**	**16**	Highest cumulative heat load
El Paso, TX	**93**	**11**	High daytime and warm-night exposure
Deming, NM	**94**	**0**	Daytime-driven heat; no qualifying warm nights
Lubbock, TX	**88**	**2**	Late-season weekly increase largest
Fresno, CA	**78**	**1**	Lowest cumulative heat exposure

Closeout rule: regional defoliation is the functional endpoint. California and Arizona have reached it; finalize Deming, El Paso and Lubbock at local defoliation initiation so every region is compared while the crop remains functionally active.

A PHYSIOLOGICAL STRESS CLOSEOUT

This is a physiological heat-stress reading, not a defoliation measure. The index accumulates qualifying daytime and warm-night stress from planting while the crop is functionally active. Regional defoliation is used only as the stop point for the time series. A matched 2025-to-2026 temperature baseline shows the largest warming at Deming and Lubbock (+2.0°F mean), followed by Safford and El Paso (+1.0°F); Fresno was nearly unchanged (+0.2°F).

MATCHED SEASONAL TEMPERATURE COMPARISON

Region / matched window	2025 average daily temperature	2026 average daily temperature
Safford, AZ Apr. 15–Sept. 18 | 157 days	High 96.4°F | Low 68.1°F Mean 82.3°F	High 97.8°F | Low 68.8°F Mean 83.3°F (+1.0°F)
El Paso, TX Apr. 20–Sept. 18 | 152 days	High 93.6°F | Low 70.4°F Mean 82.0°F	High 95.5°F | Low 70.5°F Mean 83.0°F (+1.0°F)
Deming, NM Apr. 20–Sept. 18 | 152 days	High 92.4°F | Low 63.0°F Mean 77.7°F	High 95.3°F | Low 64.1°F Mean 79.7°F (+2.0°F)
Lubbock, TX May 1–Sept. 18 | 141 days	High 90.5°F | Low 66.7°F Mean 78.6°F	High 93.3°F | Low 67.9°F Mean 80.6°F (+2.0°F)
Fresno, CA Apr. 10–Sept. 18 | 162 days	High 91.5°F | Low 64.0°F Mean 77.7°F	High 91.7°F | Low 64.1°F Mean 77.9°F (+0.2°F)

PIMA GROWERS INTERPRETATION

Region group	Closeout focus
Arizona and El Paso	Highest 2026 heat screening totals. Document late-boll maturity, irrigation continuity and any fiber-quality feedback before assigning crop effects.
Deming and Lubbock	Daytime heat dominated. Track defoliation timing and finish relative to immature-boll load; Lubbock's late-season weekly heat increase deserves context.
Fresno	Lowest heat-index total in this set. Interpret performance through water supply, crop timing and quality data, not heat count alone.

CLOSEOUT LIMITS AND NEXT COMPARISON

The 2026 record establishes the regional physiological-stress ranking and heat composition. It is retained as the baseline for a matched 2027 comparison using identical stations, planting triggers, thresholds and functional endpoint. This closeout reports observed exposure and management interpretation, not a statistical yield-loss estimate.

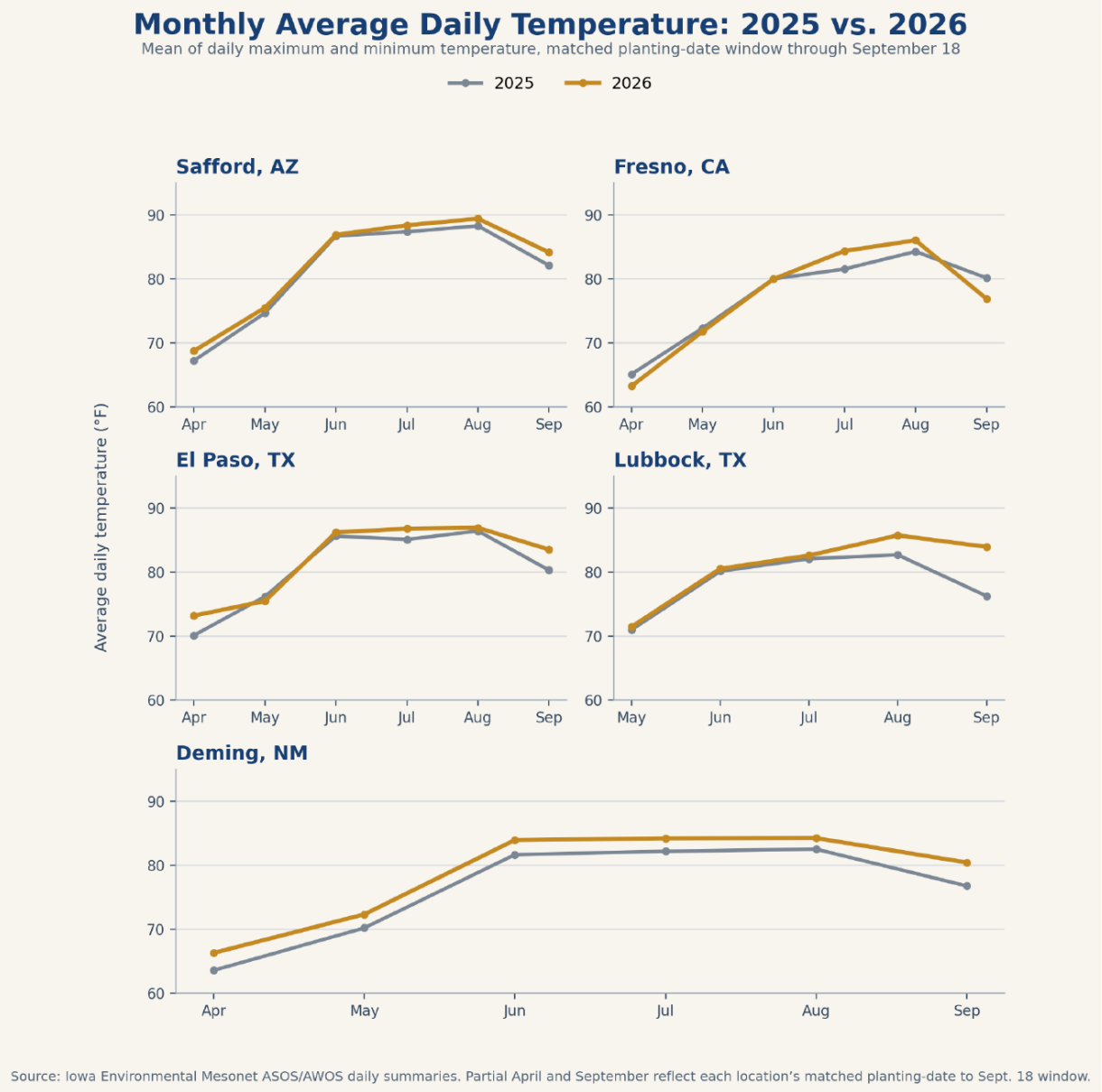
FINAL RECORD TO COMPLETE

For each region: planting date • daily Tmax/Tmin and DD60 through defoliation initiation • final defoliation date and mature-boll context • final irrigation/termination timing • harvest dates • ginning or classing observations where available • grower notes on retention, boll opening and quality.

Sources for final issue: Iowa Environmental Mesonet ASOS/AWOS daily summaries; NOAA/NCEI station archive; state agricultural weather networks where station continuity is verified; Pima Growers regional grower and gin observations. Scientific context: Cotton Foundation, Stress Physiology in Cotton; Bayer Crop Science, Cotton Growth and Development.

MONTHLY TEMPERATURE PATTERN BY REGION

Five matched station panels show the monthly average of each day's high and low temperature from planting through Sept. 18. The graphic provides a simple baseline for interpreting the 2026 physiological heat-stress record beside the 2025 season.

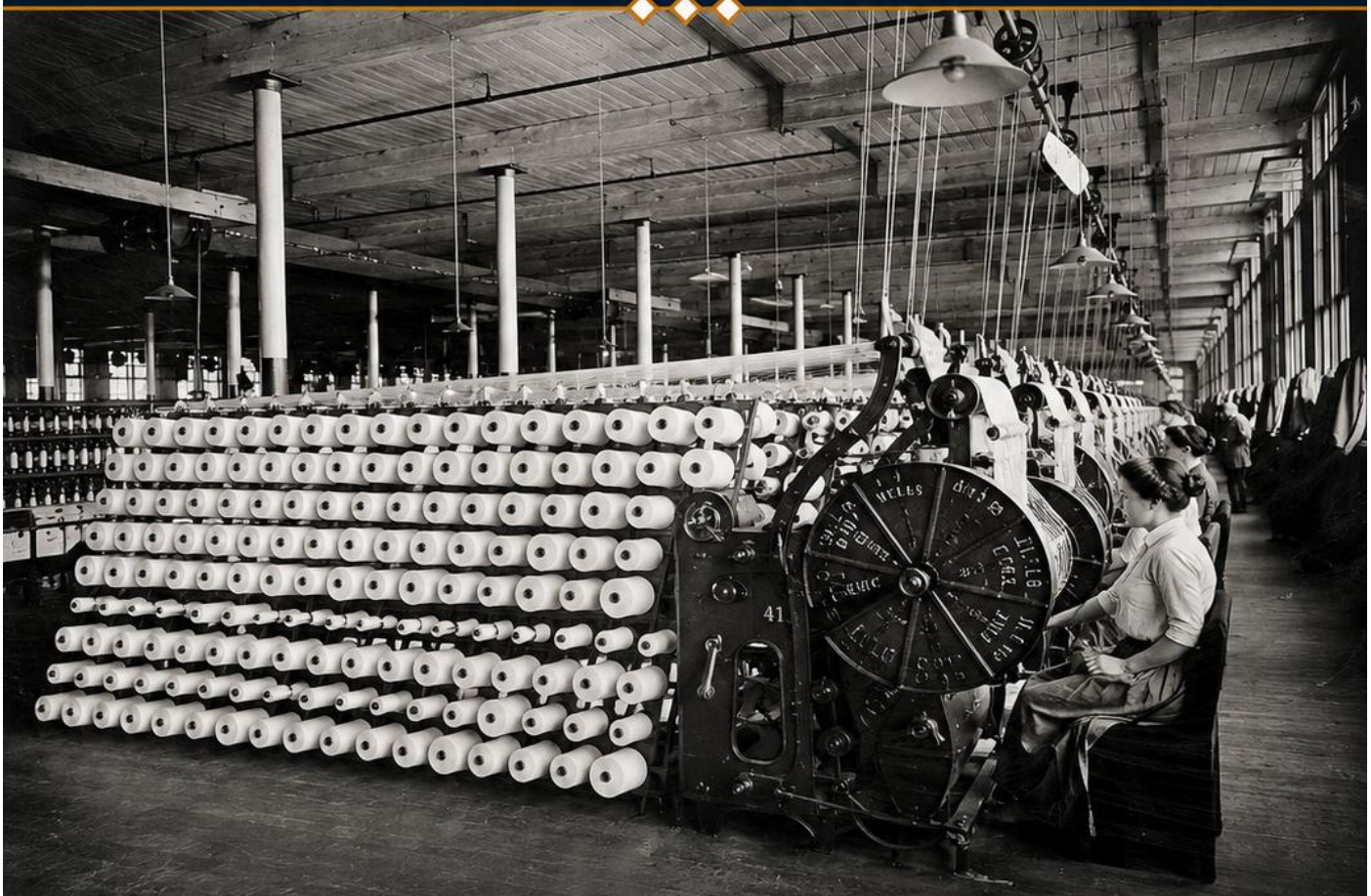


Monthly average daily temperature = mean of the daily maximum and minimum. Partial April and September reflect each location's matched planting-date to Sept. 18 window. Source: Iowa Environmental Mesonet ASOS/AWOS daily summaries.

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FIELD TO FIBER

THE JOURNEY OF PIMA® COTTON

GROWN WITH CARE › HARVESTED WITH PRIDE › GINNED WITH PRECISION › SPUN WITH INTEGRITY › WOVEN WITH QUALITY › CRAFTED TO INSPIRE

From Our Fields to the World.

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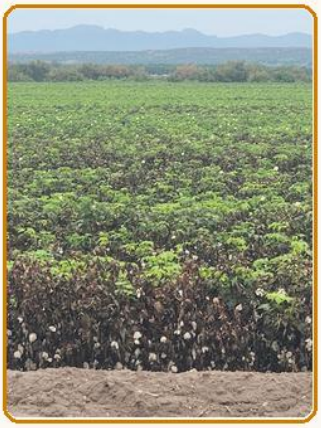
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FAR WEST TEXAS / EL PASO VALLEY UPDATE

WEEK ENDING 10-9-26



FAR WEST TEXAS / EL PASO VALLEY FIELD SUMMARY

As we covered last week, New Mexico and the El Paso area were significantly affected by recent heavy rains. Bacterial blight has been the primary concern. We are seeing significant differences between Gowan Hybrid Pima 1432 (images 1 and 2) and traditional Pima varieties (images 3 and 4) grown in the region.

We continue to recommend selecting a diverse mix of varieties based on multiple factors, including season length, yield, quality, trait packages, and disease resistance.

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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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AUTHENTICITY

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

TRANSPARENCY

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

ACCOUNTABILITY

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

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SUPERIOR FIBER. SUPERIOR OUTCOMES.

"Supima is a fully integrated downstream value system. Today, measured American Pima bale consumption is already embedded in global retail programs. Our responsibility now is to scale that system with discipline, safeguard its credibility, and translate proven retail performance into consistent, forecastable demand for American Pima."

WORLD'S FINEST FIBER

Extraordinary length, strength, softness and color—naturally superior American Pima cotton.

CERTIFIED. TRUSTED.

Supima® certification ensures authenticity, quality and traceability from field to fiber.

INTEGRATED. TRANSPARENT.

A fully integrated value system that connects growers, mills, brands and consumers.

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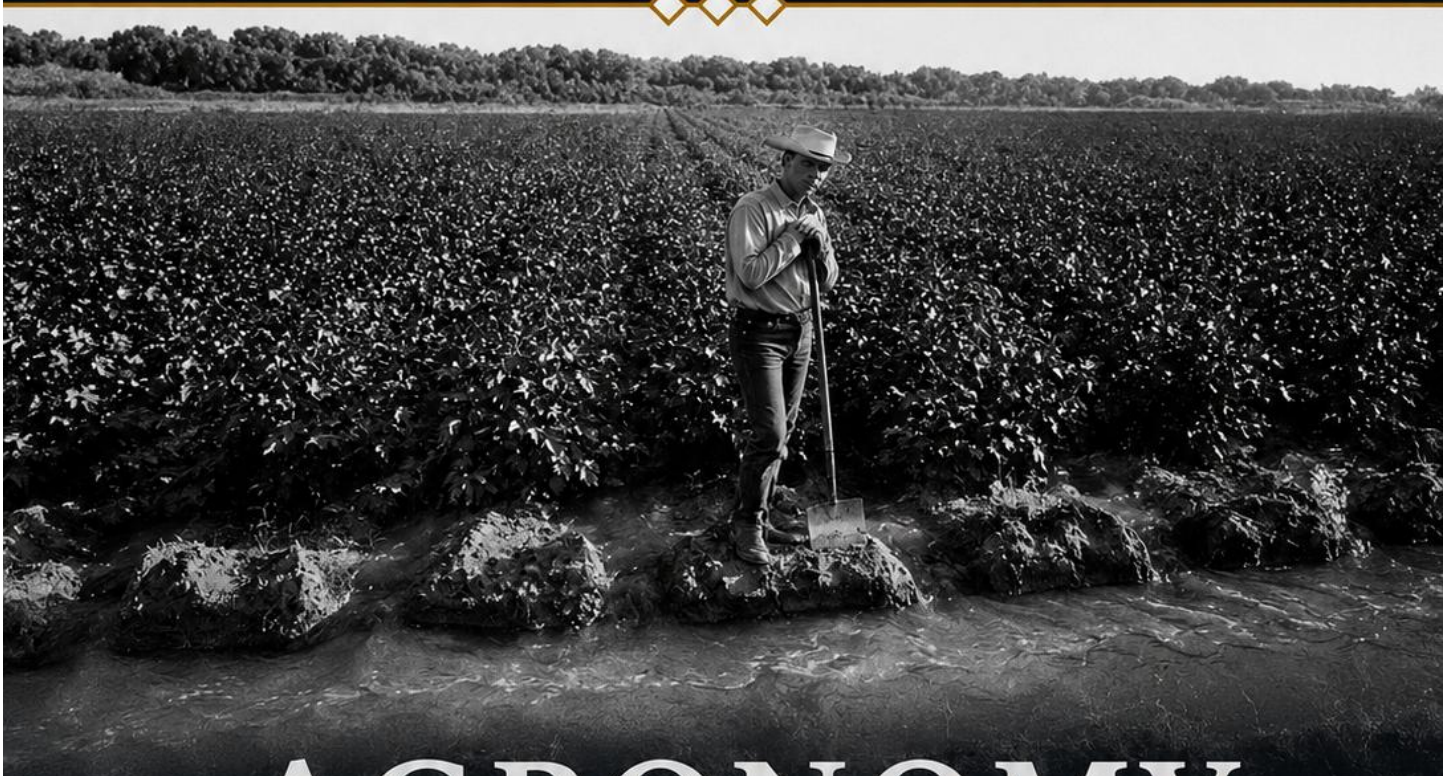
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PIMA FACTS

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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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Proven Maximum Performance

TRUSTED. EFFECTIVE. DEPENDABLE.
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TRANSPARENT. TRACEABLE. AMERICAN GROWN.

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WHERE THE CROP FINISHES

Modeled canopy value shifts as Pima begins fruiting higher and carries a longer finish.

COMMON VALUE BASIS • PER 1,000 LB OF LINT

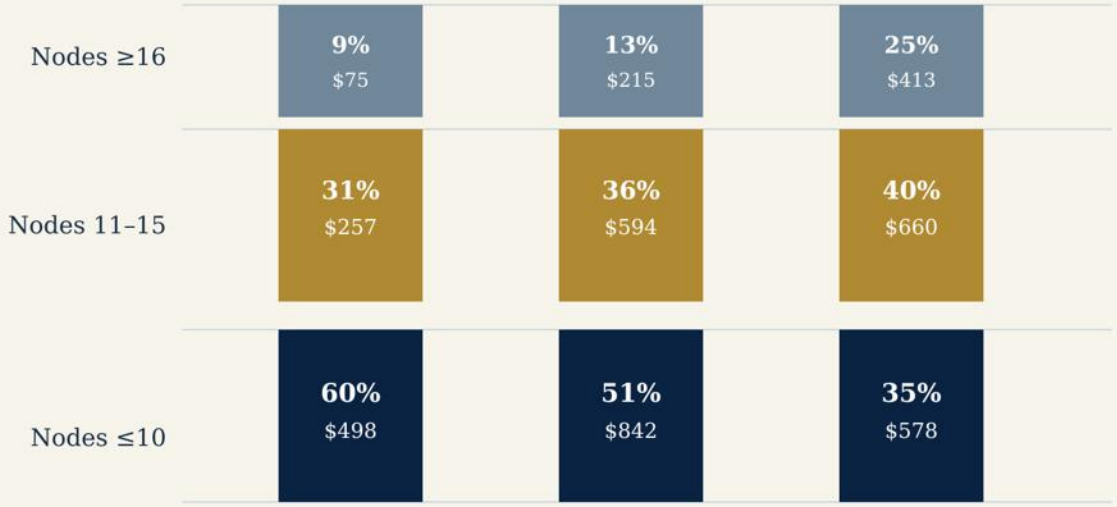
UPLAND COTTON
$0.83/lb = $830 gross fiber value

PIMA & HYBRID PIMA
$1.65/lb = $1,650 gross fiber value

	UPLAND UGA 2019 observed pattern	HYBRID PIMA Applied +1-node shift	FULL-SEASON PIMA Applied +3-node shift
FIRST FRUITING NODE	5.5	6.5	8.5

MODELED GROSS FIBER VALUE BY NODE ZONE

Normalized per 1,000 lb of lint: a canopy-value comparison, not a per-acre yield projection.



THE MANAGEMENT IMPLICATION

Pima shifts $1,073 of every $1,650 gross lint value above node 10.
That is 65% in the middle and upper canopy, versus 40% for the UGA upland baseline.

HOW TO READ THIS MODEL

Upland node shares are observed 2019 UGA data. Hybrid and full-season Pima shares are a Pima Growers applied canopy model, shifted +1 and +3 nodes using first-fruiting-node field averages. They are not measured harvest partitions.

Sources: UGA Extension, "Fruiting Position Value in GA Cotton" (2019 DP 1646 observed data); Pima Growers field-calibrated first-fruiting-node averages. Price basis: Pima and hybrid Pima $1.65/lb; upland $0.83/lb.

COTTON DEFOLIATION

Timing, Physiology and Harvest-Aid Decisions for American Pima

REPORT DATE 10-2-26



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

Rotational Crop Restrictions

Producers who wish to follow a cotton crop with a small grain such as wheat should observe the following re-crop intervals to prevent crop injury or stand failure.

Table 1: Label restrictions for planting small grains following harvest aid application in cotton.

Harvest Aid	Small Grain Re-Crop Interval
Thidiazuron	**14 days**
Ginstar/Cutout/Adios	**1 month/1 month/2 months**
Folex 6	**None**
Aim	**None**
Display	**None**
ETX	**1 day**
Reviton	**None**
Sharpen	**None**
Finish 6 Pro	**1 month**
Ethephon	**1 month**
Paraquat	**None**
Sodium Chlorate	**None**

Table 2: Label restrictions for planting small grains following harvest aid application in cotton.

Harvest Aid[1]	Labeled Broadcast Rate/Acre	Max. Use per Season	Rainfree Period (hours)[2]	Pre-Harvest Interval (Days)	Estimated min. temp.	Mature leaves	Juvenile leaves	Re-growth 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	6.0 oz	1	10	55 F	Excellent	Excellent	Poor	None
Sharpen	2.0 oz	2.0 oz	1	5	55 F	Excellent	Excellent	Poor	None
Ethephon	21-42 oz	42 oz	6	7	60 F	Fair	Poor	Poor	Excellent
Finish 6 Pro	21-42 oz	42 oz	6	7	60 F	Excellent	Poor	Fair	Excellent
Desiccants									
Paraquat	3.1-32	32	30 min.	3	55 F	Fair	Excellent	Poor	Fair
Sodium Chlorate	4.5 # ai	N/A	24	7	55 F	Fair	Fair	Poor	None

[1] Addition of spray adjuvants may enhance defoliation during cold temperatures or when leaves are tough from drought-stressed conditions. However, adjuvants may increase leaf desiccation during the early season when temperatures are warm.

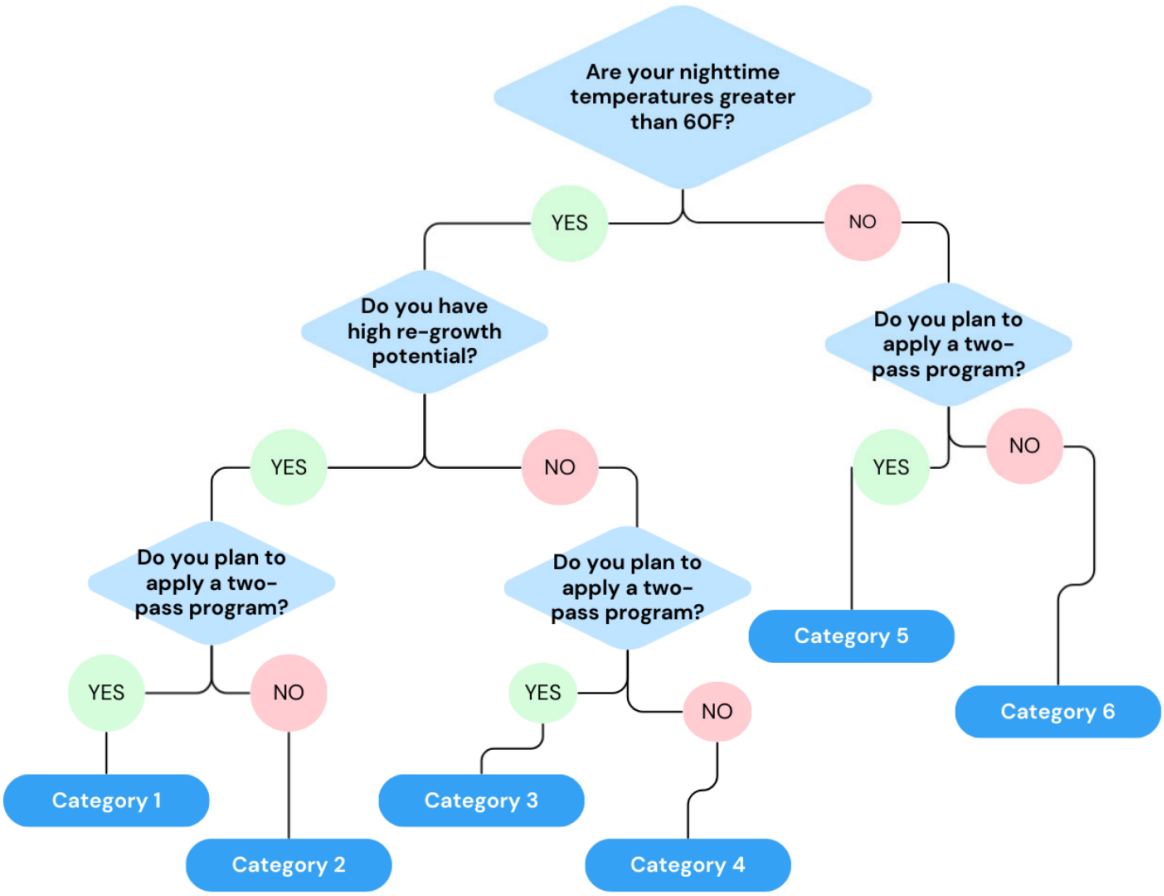
[2] Expected rainfree periods are estimates only and may or may not be exact. Other conditions, including temperature, moisture, and crop status, will play a role in product performance.

Defoliation Program Selection Guide

The following decision matrix should assist in the selection of both products and rates.

Boll openers

1. All concoctions listed below assume boll opening is required. If all bolls present are open, boll openers can be excluded.
2. Boll opener rates below refer to 6 lb ai/gallon ethephon containing products. If using an ethephon product of a lower ai/gallon, adjust rate accordingly.
3. Some boll openers contain the actives of both ethephon and cyclanilide (Finish 6 Pro, Terminate). Although ethephon products containing cyclanilide are preferred (work faster, provide some regrowth control, and can assist in leaf drop), they are more expensive than products only containing ethephon. One effective strategy to reduce cost is to split the recommended boll opener rate between the higher cost ethephon and cyclanilide product with a straight-good ethephon containing product, thereby allowing you to realize the benefits of cyclanilide at somewhat of a discount.



Defoliation Program Product Selection Guide

Category 1 — Warm temperatures; high regrowth potential; two-pass program

Thidiazuron 2-3 oz/acre **+** Boll opener 10-16 oz/acre

fb Folex 6 EC 6-8 oz/acre or a PPO **+** Boll opener 16-24 oz/acre

Thidiazuron 2-3 oz/acre + Folex 6 EC 4-6 oz/acre **+** Boll opener 16 oz/A

fb Folex 6 EC 6-8 oz/acre or a PPO **+** Boll opener 16-24 oz/acre

Ginstar/Cutout/Adios 2-4 oz/acre **+** Boll opener 10-16 oz/acre

fb Folex 6 EC 6-8 oz/acre or a PPO **+** Boll opener 16-24 oz/acre

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Category 2 — Warm temperatures; high regrowth potential; one-pass program

Thidiazuron 2-3 oz/acre **+** Boll opener 21-32 oz/acre

Thidiazuron 2-3 oz/acre **+** Folex 6 EC 4 oz/acre + Boll opener 21-32 oz/acre

Ginstar/Cutout/Adios 2-4 oz/acre **+** Boll opener 21-32 oz/acre

---

Category 3 — Warm temperatures; low regrowth potential; two-pass program

Thidiazuron 2 oz/acre **+** Folex 6 EC 4-6 oz/acre **+** Boll opener 21 oz/acre

fb Folex 6 EC 6-8 oz/acre or PPO **+** Boll opener 21-32 oz/acre

Thidiazuron 2 oz/acre **+** Boll opener 16-21 oz/acre

fb Folex 6 EC 6-8 oz/acre or PPO **+** Boll opener 16-21 oz/acre

Folex 6 EC 6-8 oz/acre + Boll opener 16-21 oz/acre

fb a PPO **+** Boll opener 16-21 oz/acre

Category 4 — Warm temperatures; low regrowth potential; one-pass program

Thidiazuron 2 oz/acre + Folex 6 EC 4-6 oz/acre + Boll opener 21-32 oz/acre

Folex 6 EC 6-8 oz/acre + Boll opener 21-32 oz/acre

Ginstar/Cutout/Adios 4-6 oz/acre + Boll opener 21-32 oz/acre

Category 5 — Cooler temperatures; two-pass program

Folex 6 EC 10-16 oz/acre + Boll opener 16-21oz/acre

fb Folex 6 EC 10-16 oz/acre or a PPO **+** Boll opener 16-21 oz/acre

Ginstar/Cutout/Adios 6-9 oz/acre + Boll opener 16-21 oz/acre

fb Folex 6 EC 6-8 oz/acre or a PPO **+** Boll opener 16-24 oz/acre

---

Category 6 — Cooler temperatures; one-pass program

Folex 6 EC 10-16 oz/acre + Boll opener 24-42 oz/acre

Ginstar/Cutout/Adios 6-9 oz/acre + boll opener 24-42 oz/acre

WEATHER, PLANT CONDITION & HARVEST TIMING

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

The 3-5 day weather window controls response.

High temperature, sunlight and low humidity increase activity. Nights above 60°F support response.

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 or 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

Freeze-risk principle

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

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 should be evaluated before the picker enters the field.



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.

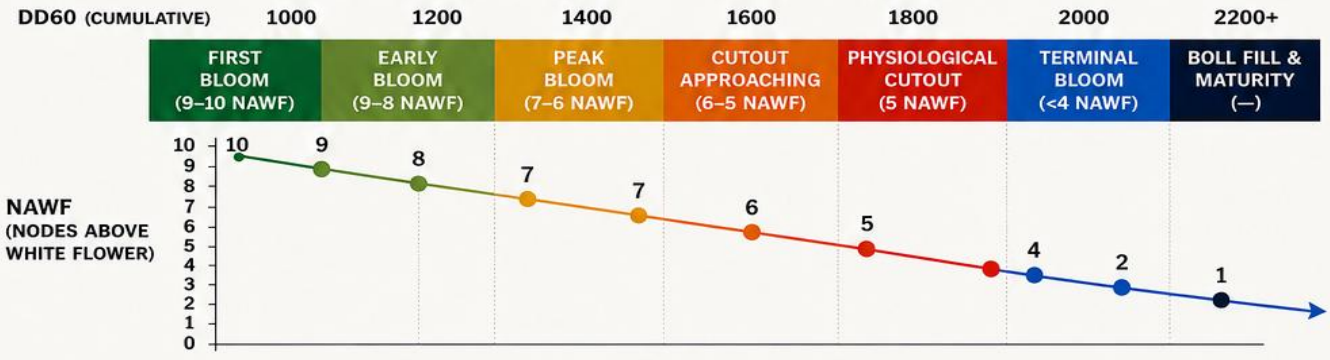
> **"DD60 measures the season. NAWF measures the crop."**

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

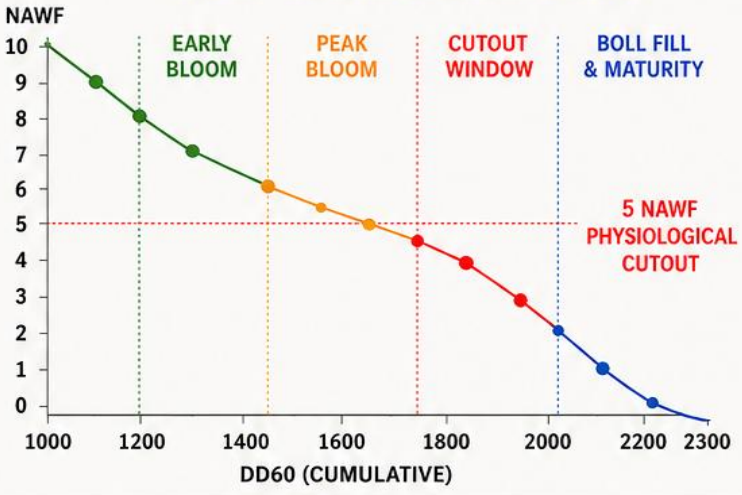


DD60 / NAWF BENCHMARK GUIDE

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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TRADE POLICY SOURCE

Source acknowledgment

Gherzi Americas and Robert Antoshak — trusted source in the integrated textile industry.

Gherzi Americas Insights: gherziamericas.com/#insights

GHERZI AMERICAS

BRIEF NO. 13 — TRADE POLICY

The Quota Comes Back

USTR has been directed to create tariff-rate quotas conditioned on buying American fiber. Some of us have seen this film.

WHAT HAPPENED

On 23 July, USTR issued its final action under a Section 301 investigation into whether sixty economies enforce prohibitions on goods made with forced labor. New tariffs took effect at 12:01 a.m. the following morning.

Buried in the announcement is something the trade press skipped past. USTR has been directed to establish tariff-rate quotas for textiles and apparel from Bangladesh, Cambodia, Indonesia, and Malaysia. Initial duration of three years. Qualifying volumes enter free of the Section 301 duty. Eligibility is tied to each country's purchases of US cotton and US textile inputs.

That is a quota. Conditioned on buying American fiber.

WHY THIS IS FAMILIAR

The Multifibre Arrangement governed textile trade from 1974 to 1994. The Agreement on Textiles and Clothing replaced it and phased out on 1 January 2005. For roughly thirty years, sourcing decisions in this industry were made against category limits, visas, quota charges, and bilateral negotiations that ran on for months.

Some of us spent our careers in those rooms. The instinct in 2005 was that we would never see anything like it again.

Now there is a volume limit, allocated by country, granted in exchange for a commercial concession. Call it a tariff-rate quota if that reads better. The mechanism is a quota.

WHAT IT WILL DO

Bangladesh has already been told that garments made with US cotton qualify for duty-free treatment starting in September. For a country whose apparel exports to the US ran $9.04 billion in the fiscal year ending 30 June, circle September.

The four named countries get a lane. Everyone else does not. India landed in the same 10% tariff tier as Bangladesh with no quota access. Identical headline rates, different landed cost on covered goods.

US cotton gains a demand channel that no marketing program has ever produced. Four countries with a direct financial reason to specify American fiber.

> Call it a tariff-rate quota if that reads better. The mechanism is a quota.

WHAT NOBODY KNOWS YET

Start with volumes. USTR has not published them. Implementation is described as feasible by 1 September and a separate Federal Register notice will set the numbers and the start date. Until then, the goods carry the full rate.

Allocation method matters more than the headline volume. First come first served and historical share produce very different markets. License allocation produces a third. Anyone who traded quota in the 1990s can explain what happens when the allocation method is announced.

Verification is the other open question. Proving that a garment contains US cotton means chain of custody documentation running back through the spinner, and spinners blend bales from four or five origins into a single lay-down because that is how

you hold a consistent count at a consistent price. Segregating costs them. They will price it into the yarn.

WHAT TO DO NOW

If you source from any of the four, start conversations with your mills about US cotton supply lines. The countries that move first will absorb the quota.

If you source from India, Vietnam, or anywhere outside the mechanism, model the scenario where a competitor's covered goods enter free.

Watch the Federal Register.

Bob Antoshak advised the US government on bilateral textile quota negotiations under the MFA and ATC.



Mid-Week Market Brief

NEWS AND INSIGHT FOR THE TEXTILES & APPAREL TRADE

VOL. I • NO. 20
WEDNESDAY,
OCTOBER 7, 2026

Trends. Data. Analysis. A more informed textile and apparel industry.

WHEN FALL DOESN'T FEEL LIKE FALL



Longer, hotter summers are beginning to collide with fashion's traditional selling calendar. At Paris Fashion Week, temperatures reached 28°C (82.4°F), while retailers face a familiar problem: coats and other high-margin fall merchandise do not move when shoppers are still dressing for summer. Designers and retailers are responding with lighter fabrics, transitional product and a harder look at when seasonal inventory should actually hit the floor.

THE WEEK'S READ


Hotter autumns disrupt fashion calendar.


U.S. luxury spending falls 6% in September.


Trent fashion revenue rises 23%.


ASOS reports customer-data breach.


U.S. apparel trade data updated through August.

28°C	-6%	+23%	250	10%	AUGUST
PARIS	**U.S. LUXURY**	**TRENT**	**NEW STORES**	**ASOS**	**OTEXA**
Fashion Week heat.	September spending, year over year.	Q2 standalone revenue.	Trent added in FY2026.	Share decline after breach disclosure.	Latest U.S. trade-data month.

FIVE STORIES TO WATCH

01 SEASONS



Warmer autumn weather is delaying demand for coats and other high-margin cold-weather apparel, raising markdown risk.

02 PRODUCT



Designers are adding lighter, breathable and transitional garments as the traditional fall calendar becomes less reliable.

03 LUXURY



U.S. luxury spending fell 6% year over year in September, the third straight monthly decline in credit-card data cited by Reuters.

04 INDIA



Fashion retailer Trent reported 23% Q2 standalone revenue growth after a major store-expansion push.

05 DIGITAL



ASOS disclosed a customer-data incident involving third-party communication platforms; payment-card details and passwords were not compromised, the company said.

THE BOTTOM LINE



Fashion still plans in seasons. Consumers increasingly buy according to the weather outside the door. That mismatch can turn perfectly good inventory into markdown merchandise. Climate is becoming a merchandising, sourcing and inventory problem—not just a sustainability discussion.

BOB'S TAKE



"A coat arriving on time is not much use if nobody needs one yet. The industry has spent years shortening lead times. The next step may be using that speed to delay commitments until retailers have a better idea what the season is actually going to look like."

Sources: Reuters • OTEXA • Data through Oct. 7, 2026

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

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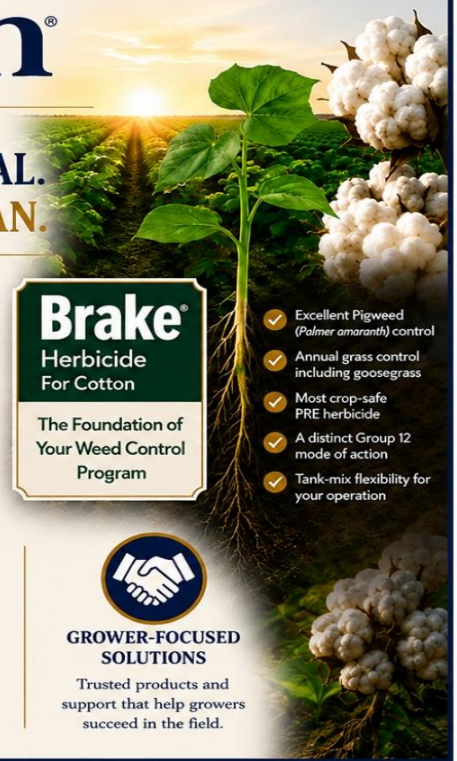
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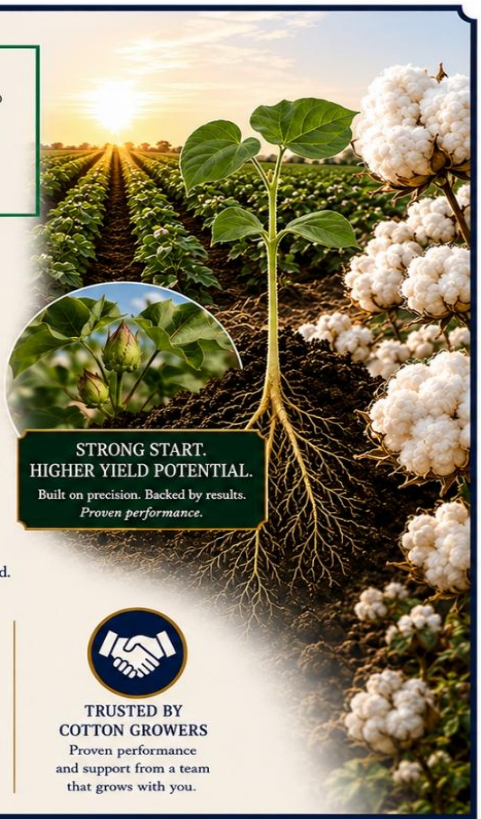
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Maple Gin is committed to ginning American Pima cotton with integrity, efficiency, and unmatched quality.



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

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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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- 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


EST.
2018
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AMERICA'S FINEST COTTON