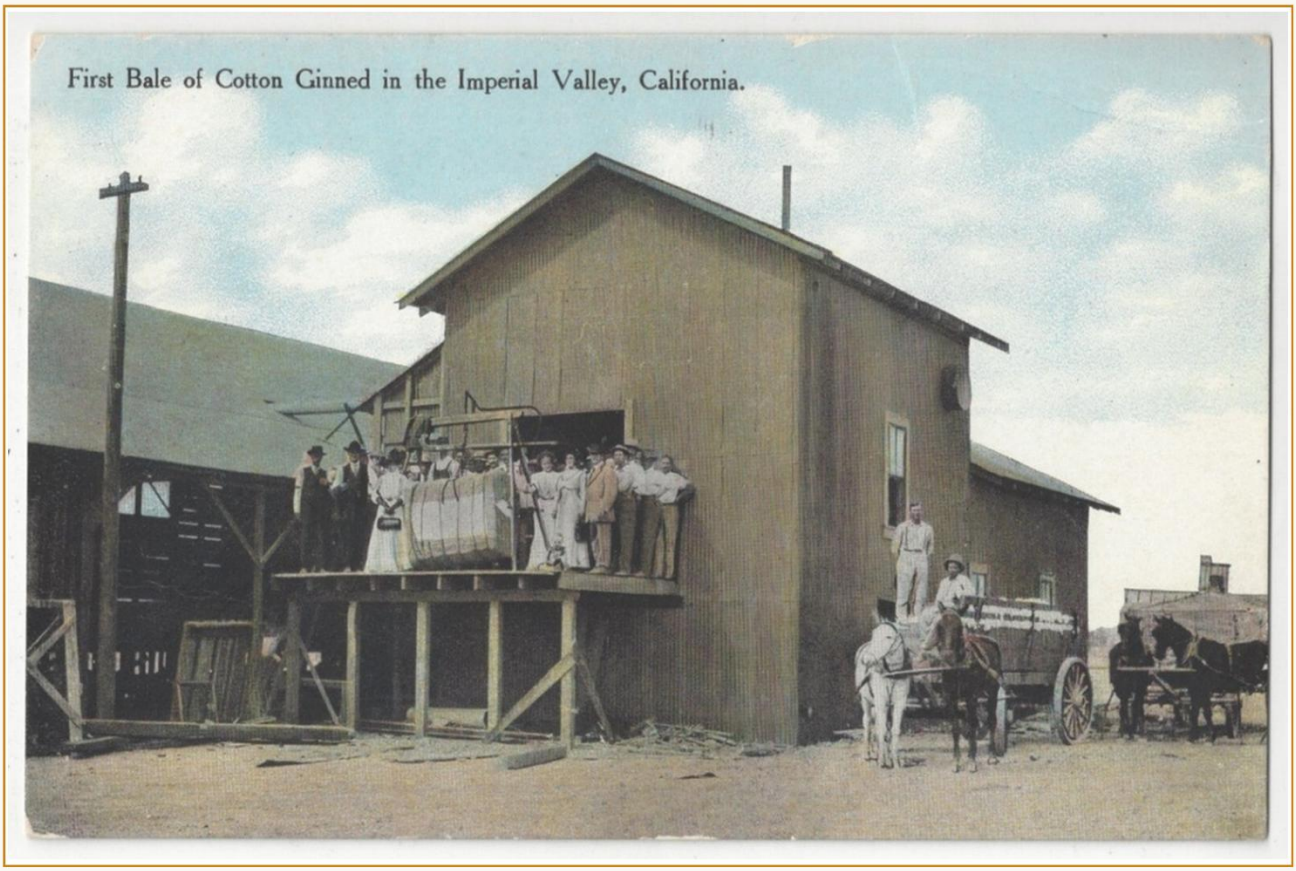
PIMA GROWERS

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

WEEK ENDING OCTOBER 23, 2026



THIS WEEK'S FEATURE ARTICLES

FARM ECONOMICS • OCTOBER 19

USDA Announces $8 Billion Harvest Fuel Relief Program

One-time support is planned for modeled losses during the 2026 crop year.

USDA announced an $8 billion national funding pool for one-time payments. Cotton-specific Title I rates are expected in November; application timing and individual payment amounts have not yet been announced.

POLICY & TRADE • GREAT AMERICAN COTTON PLAN

Great American Cotton Plan Adds Risk and Trade Actions

USDA's October update adds insurance flexibility and a new cotton TRQ role.

For 2027, RMA plans to let growers combine multiple endorsements on one crop policy, with final guidance due Nov. 30. USDA's Foreign Agricultural Service will take direct responsibility for cotton TRQ administration; operating details remain pending.

ALSO IN THIS ISSUE

MARKET INTELLIGENCE
Weekly price and global market review

CROP PROGRESS
U.S. harvest pace and regional conditions

PIMA SUPPLY
Outlook, balance sheet and loan values

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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THE WEEK IN PIMA

Executive summary • Feature stories, fiber prices & market moves

WEEK ENDING OCTOBER 23, 2026



PRICE & MARKET MOVES

SELECTED READINGS • WEEK ENDING OCT. 23

Dec. 2026 ICE cotton	**80.20¢/lb**	+20 points w/w
American Pima spot	**$1.5275/lb**	USDA 2-2-48
Pima landed, SE Asia	**$1.88/lb**	Cotton Outlook quote
Organic Pima	**$2.25/lb**	Current trading
Pima/Upland spread	**$0.71/lb**	11¢ below 5-year avg.
WTI crude oil	**$103.27/bbl**	+3.8% Friday
Polyester staple fiber	**$0.62/lb**	Current indication
Ocean freight, WCI	**$4,585/40-ft**	+2% w/w

FEATURE ARTICLES

USDA • FARM SUPPORT

USDA Announces $8 Billion Harvest Fuel Relief Program

USDA announced one-time payments for the 2026 crop year to offset part of modeled losses amid market disruption and higher input costs. Cotton-specific Title I rates are expected in November; application dates and individual payment amounts are still pending.

USDA • POLICY & TRADE

Great American Cotton Plan Adds Risk and Trade Actions

For 2027, RMA plans to let producers combine multiple endorsements on one crop policy, with final guidance due Nov. 30. USDA's Foreign Agricultural Service is also taking responsibility for cotton TRQ administration and developing a 2027 mechanism; operating details remain pending.

ALSO IN THIS JOURNAL Global market review • Pima supply outlook • Supima export sales • U.S. crop progress • Harvest quality

PIMA & CROP SIGNALS

383,000
BALES • 2026 PIMA CROP
Down 9,000 from September.

83,000
BALES • 2026/27 ENDING STOCKS
Down 9,000 from prior estimate.

206.3K RB
SUPIMA COMMITMENTS
+56.4% year over year.

41%
U.S. COTTON HARVESTED
As of Oct. 18; 4 pts ahead of average.

This week: modest cotton-futures gains met rising energy and freight costs, while the Pima/Upland spread narrowed.

Sources: USDA AMS Spot Cotton Quotations and Pima market benchmarks (Oct. 23, 2026); Pima Growers Global Market Week in Review (Oct. 23); Supima Week 11 Export Sales (week ending Oct. 15); USDA Crop Progress (Oct. 18); USDA Harvest Fuel Relief (Oct. 19) and Great American Cotton Plan update (Oct. 16).

FEATURE ARTICLE / FARM ECONOMICS OCTOBER 19, 2026

USDA Announces $8 Billion Harvest Fuel Relief Program

One-time payments are planned for the 2026 crop year; USDA has yet to publish cotton rates or an application schedule.

The U.S. Department of Agriculture says it will make $8 billion available for one-time Harvest Fuel Relief payments to farmers this harvest season. Announced October 19 by President Donald Trump and Agriculture Secretary Brooke Rollins, the program is intended to address temporary market disruptions and higher input costs during the 2026 crop year. [1]

For cotton producers, the central point is that the announcement sets a national funding pool, not an individual payment amount. USDA says the program will use a uniform formula to cover a portion of modeled losses. It has not yet released commodity-specific rates, so growers cannot calculate a cotton payment from the $8 billion figure alone.

How USDA plans to calculate support

The Harvest Fuel Relief (HFR) program will use a national loss average based on planted-acre information reported to the Farm Service Agency (FSA), cost-of-production estimates from USDA's Economic Research Service, and yields and prices from the World Agricultural Supply and Demand Estimates. USDA describes the approach as similar to Farmer Bridge Assistance (FBA), which also used proportional support based on modeled losses. [1]

Payments are authorized under the Commodity Credit Corporation Charter Act and will be administered by FSA. USDA says HFR participation will not require a link to crop insurance. The department nevertheless encourages producers to use available risk-management tools to help address future price risk and volatility. [1]

Cotton rates and application details are pending

USDA plans to release commodity-specific payment rates for Title I commodities in November. It has not specified how cotton's rate will be calculated within the program or how much of the national funding will be allocated to any one commodity. The department says payment methodology for other eligible commodities will come later. [1]

What producers can do now

USDA encourages eligible producers to create a Login.gov account and link it to their USDA account before the application period is announced. The department says pre-filled applications will be available online to producers who complete that linkage. No application opening date or deadline was included in the announcement. [1]

Producers of non-Title I commodities—including specialty-crop growers and fishermen—are invited to send information about increased fuel costs to HarvestFuel@usda.gov. USDA says it will consider those data when setting payment rates. [1]

A new round of support amid farm-cost pressure

The HFR announcement follows other federal payments cited by USDA. The department said FBA delivered $12 billion in one-time payments to more than 560,000 farmers earlier in 2026. USDA also reported nearly $14 billion in gross Agriculture Risk Coverage and Price Loss Coverage payments about two weeks before the HFR announcement, describing that total as roughly $8 billion more than producers would have received without the Working Families Tax Cuts Act. [1]

Plains Cotton Growers CEO Kody Bessent welcomed the announcement, pointing to rising input costs and narrow operating margins. “For cotton producers across the Texas High Plains, this assistance comes at a critical time and reinforces the importance of ensuring American agriculture remains strong, competitive and sustainable for generations to come,” Bessent said. [2]

What to watch next

The next key information for cotton growers is the USDA’s November release of Title I payment rates, followed by FSA application instructions and dates. Until those details are published, the $8 billion program should be understood as a planned national pool for one-time support—not a guarantee of a particular payment to an individual operation.

Sources

[1] U.S. Department of Agriculture, “Trump Administration Announces $8 Billion Harvest Fuel Relief Program,” October 19, 2026. Read source

[2] Plains Cotton Growers, statement from CEO Kody Bessent.

FEATURE ARTICLE / POLICY & TRADE OCTOBER 19, 2026

Great American Cotton Plan Adds Risk and Trade Actions

USDA's October update advances the plan's risk-protection and trade priorities with new crop-insurance flexibility and a planned cotton TRQ mechanism.

On October 16, the U.S. Department of Agriculture announced two actions under the Great American Cotton Plan: expanded crop-insurance flexibility for 2027 and a transfer of cotton tariff-rate quota administration to USDA's Foreign Agricultural Service. The measures advance two of the plan's four priorities—protecting growers from risk and improving cotton trade. **[1]**

More flexibility in crop insurance

Beginning with the 2027 crop year, USDA's Risk Management Agency plans to allow producers, including cotton growers, to purchase multiple endorsements on a single crop insurance policy. USDA says the change is intended to give eligible producers more options for managing adverse risks. **[1]**

The practical details are still pending. RMA plans to provide final guidance to Approved Insurance Providers and crop insurance agents by November 30, 2026. Until that guidance is issued, growers should avoid assuming which endorsements may be combined or how the change will affect coverage and cost. Those details should be reviewed with an insurance agent. **[1]**

A new role for USDA in cotton trade

USDA's Foreign Agricultural Service (FAS) will assume responsibility for the cotton tariff-rate quota (TRQ) process. FAS is developing a mechanism intended to encourage purchases of U.S. cotton, with launch planned for 2027. **[1]**

The process is expected to involve Bangladesh, Indonesia, Cambodia and Malaysia. FAS will help verify purchases of U.S. cotton by participating countries in connection with preferential tariff treatment for apparel produced using U.S. cotton and textile inputs. The program's operating rules and potential effect on cotton demand have not yet been announced. **[1]**

The plan's four priorities

USDA launched the Great American Cotton Plan in May 2026 with four priorities: promoting domestic cotton consumption; increasing domestic demand and production; improving trade; and protecting growers from risk. The October announcements build on the last two. USDA also said it would continue working with Congress to support the bipartisan Buying American Cotton Act. **[2]**

BACA remains a separate legislative effort

BACA fits within the plan's domestic-demand discussion, but it is not one of the October agency actions. The proposed legislation would establish a domestic cotton consumption credit and document cotton processing through a traceable supply chain. The House bill, H.R. 7230, and Senate bill, S. 1919, remain separate legislative measures. **[3][4]**

The National Cotton Council reported that BACA reached 100 House co-sponsors on September 24. The House bill was referred to Ways and Means, and the Senate bill was referred to Finance. Those referrals and co-sponsor totals show congressional activity; they do not mean the legislation has passed committee or become law. **[4][5]**

What growers should watch

The next practical milestones are RMA's final insurance guidance and additional details from FAS on the 2027 TRQ mechanism. For BACA, the key milestone remains congressional action. The efforts share an aim of strengthening U.S. cotton, but they use different tools and follow separate timelines.

Sources

[1] USDA. Great American Cotton Plan actions, October 16, 2026. Read source

[2] USDA. Great American Cotton Plan launch, May 28, 2026. Read source

[3] U.S. Congress. H.R. 7230, Buying American Cotton Act of 2026. Read source

[4] U.S. Congress. S. 1919, bill status and actions. Read source

[5] National Cotton Council. BACA reaches 100 House co-sponsors, September 24, 2026. Read source

SOUTHWEST COTTON

— PHYSIOLOGY CONFERENCE —

REGISTER NOW

Date:
February 9-11, 2027

Location:
1102 East FM 1294
Lubbock, TX 79403

Registration website:

https://tpma.eventsmart.com/

Conference website:

southwestcottonconf.github.io

SCAN ME!

PROGRAM DETAILS

- Regional public cotton breeding programs
- Heat stress in cotton
- Regional water sources
- Seed quality
- Extra Long Staple and American Elite Upland opportunities for the region
- Tour and dinner at the FBRI
- Complexities of cotton fertility
- Regional mesonet overview
- Updates from industry and commodity organizations



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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 23, 2026

EXECUTIVE SUMMARY

American Pima spot is $1.5275/lb (USDA 2-2-48), and landed Southeast Asia is $1.88/lb. The current Pima/Upland spread is $0.71/lb, below the prior five-year average of $0.82/lb. PSF at $0.62/lb and WTI at $103.27/bbl keep cost competition in focus.

The Supima Week 11 report recorded 1.9K running bales (RB) in net sales and 7.5K RB in weekly exports. Total commitments reached 206.3K RB, up 56.4% year over year; 37.4% has shipped, with 129.0K RB outstanding after a third drawdown in four weeks.

- **Total Commitments** — 206.3K RB | +56.4% YoY
- **Weekly Exports** — 7.5K RB
- **Current Pima/Upland Spread** — $0.71/lb

AMERICAN PIMA VALUE POSITION

+$0.71/LB

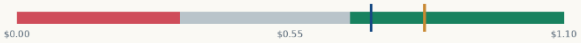
PREMIUM OVER UPLAND

Long-Staple Price Ratio: 188%

Five-Year Average Spread: $0.82/lb

MIXED • COMMITMENTS +56.4% YOY

Primary Risks: India Concentration, Energy Costs & End-Demand Recovery



FIBER MARKET BENCHMARKS | PCIA INDICATIONS

INDICATOR	CURRENT	COMPARISON / SIGNAL
American Pima Landed Southeast Asia	$1.88/lb	Cotton Outlook quote
American Pima Spot	$1.5275/lb	USDA 2-2-48 • 152.75¢/lb
Organic Pima - Current Trading	$2.25/lb	U.S. market
Giza 94 Landed Southeast Asia - Egypt	$1.46/lb	Egypt
Israel ELS Landed Southeast Asia - Israel	$1.85/lb	Israel
Xinjiang Long Staple Type 137 - China	$1.84/lb	China
U.S. Pima - Prior 5-Year Average	$1.65/lb	Reference
Upland - USDA Dec. 2026 Average	$0.8147/lb	USDA basis
Upland - Prior 5-Year Average	$0.83/lb	Reference
Pima/Upland Prior 5-Year Spread	$0.82/lb	Reference
Current Pima/Upland Spread	$0.71/lb	11¢ below 5-year avg.
WTI Crude Oil	$103.27/bbl	External cost risk
Polyester Staple Fiber	$0.62/lb	Competitive headwind

PIMA MONITOR

METRIC	2026 PROJ.	2025	2024 ACTUAL
Acres	137,000	142,000	200,500
Production (Bales)	383,000	388,000	471,000
Ending Stocks (Bales)	2025/26: 105,000 | 2026/27 proj.: 83,000		

SUPIMA WEEK 11 EXPORT SALES

Total Commitments	206.3K RB (+56.4% YoY)
Net Sales	1.9K RB (Buy-backs effectively nil)
Weekly Exports	7.5K RB
Shipped to Date	77.2K RB / 37.4%
Outstanding Sales	129.0K RB

COMMITMENTS	ACRES VS 2024	PRODUCTION VS 2024	COMMITMENTS SHIPPED
+56.4% YoY	−31.7%	−18.7%	37.4%
206.3K RB	137K vs 200.5K	383K vs 471K	77.2K of 206.3K

SUPIMA WEEK 11 TRADE DETAIL | USDA EXPORT SALES

NEW SALES BY MARKET	
Vietnam	1.3
Peru	0.5
Japan	0.1
Net sales	1.9

TOP MARKETS - TOTAL COMMITMENTS (K RB)	
India	93.3
Vietnam	42.0
Egypt	11.4
China	10.7
Bangladesh	9.8

SEASON SHIPMENT PROGRESS

37.4% shipped | 55.8% at this point last year



Sources: USDA AMS Daily Spot Cotton Quotations, Oct. 23, 2026; Supima Weekly Pima Market Report, Week 11 (ending Oct. 15); Pima Monitor estimates supplied.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 11 · Ending October 15, 2026 · MY 2026/27 (Aug–Jul)

Loadings Do the Work: Another 7.5k Ships in a Quiet Sales Week

All quantities in thousands of running bales (RB). Comparisons are week-over-week unless noted.

NET SALES	WEEKLY EXPORTS	TOTAL COMMITMENTS	SHIPPED TO DATE	OUTSTANDING SALES
1.9 k RB	**7.5** k RB	**206.3** k RB	**37.4** %	**129.0k**
▼ 8.1 buy-backs effectively nil	▼ 2.9 vs 10.4	▲ 56.4% YoY LY 131.9	77.2 of 206.3 · LY 55.8%	▼ 5.6k WoW third draw-down in four weeks

THIS WEEK IN THE MARKET

The export machine kept grinding. Exporters moved another 7.5k RB — a fourth heavy loading week in five — pushing accumulated shipments to 77.2k, 4.9% ahead of last year. India took 6.4k of the loadings, and 37.4% of the book has now shipped versus 55.8% a year ago. Outstanding sales fell 5.6k to 129.0k.

New business paused after the 10k surge. Mills signed just 1.9k RB — the second-quietest week of the MY — with buy-backs effectively nil. Vietnam led at 1.3k, lifting its book to 42.0k, and Peru returned to the buy side with 0.5k two weeks after its 4.0k cancellation. India sat the week out, easing its share to 45.2%.

The book still sits 74.4k ahead of last year. Total commitments of 206.3k RB stand 56.4% above last year's 131.9k. The YoY percentage keeps compressing as the prior year's strong October enters the comparison — last year added 5.0k that same week — but MY-to-date net new business has now reached 96.6k RB.

- Shipping momentum is the season's quiet strength: 27.2k RB has moved in the past three weeks alone, and the shipped-share gap versus last year narrowed to 18 points (37% vs 56%).
- Demand weeks are alternating between surges and pauses — 10.0k then 1.9k — so the 2-week view (6.0k/wk of net sales) remains the fairer read than either print.
- Pace coverage firmed to 2.8× (9.0k/wk 2-week average vs 3.1k/wk required), the best since week 8's 3.4×.

TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



WEEK 11 NEW SALES BY MARKET

k RB



SEASON SHIPMENT PROGRESS

% of commitments shipped



With 41 weeks left, clearing 129.0k RB of outstanding sales requires ~3.1k RB/wk against a trailing 2-week pace of 9.0k — 2.8× coverage. At October's loading rhythm, accumulated exports would cross half the current book around Thanksgiving, several weeks earlier than the required path.

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 17, 2026

Nordstrom's Supima-titled program set a new tracked high: $1.88M across 85 styles (+34.9% WoW, 30.1k units), with home leading the surge — a 400-thread-count Supima sateen fitted sheet did $285k and the Supima Cotton Blanket $255k — alongside the long-sleeve crew's $251k and a $158k turtleneck. Original Favorites doubled off its quiet week to $28.8k. The market index holds at $223M trailing-twelve-month 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® · 85 SKUS



$1.88M

▲ 34.9% WoW

30,127 units

Home textiles drove the record: $285k sheets + $255k blanket; LS crew $251k

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 15, 2026); Particl retail intelligence — DTC e-commerce only, excludes wholesale, offline, and several of the largest Supima users (e.g., UNIQLO). DTC windows: Oct 7–17 vs Oct 4–10, 2026. Forecast = required weekly export pace vs trailing 2-week average. Prior-MY comparisons from USDA prior-year columns.

Daily Spot Cotton Quotations

Agricultural Marketing Service
Cotton and Warehouse Market News

23-Oct-26

Volume 109, No. 59

Spot quotations and differences are for cotton equal to the official standards, net weight, in mixed lots. Upland quotations are FOB car/truck, which includes compression and any brokerage charges. The upland base quality is color 41, leaf grade 4, staple 34 (1.05 to 1.07),mike 3.5, 3.6 and 4.3 to 4.9, strength 27.0 to 28.9 grams per tex and uniformity 81.0 to 81.9. American Pima quotations are UD free, FOB warehouse, and brokerage fees included.

UPLAND SPOT PRICE QUOTATIONS

Growth Areas	Color 41, Leaf 4, Staple 34			Color 31, Leaf 3, Staple 36		
	Basis Points		Cents/Pound	Basis Points		Cents/Pound
Southeast	-50	Dec-26	79.70	525	Dec-26	85.45
North Delta	-225	Dec-26	77.95	250	Dec-26	82.70
South Delta	-225	Dec-26	77.95	200	Dec-26	82.20
East TX-South TX	-600	Dec-26	74.20	-75	Dec-26	79.45
West TX-KS-OK	-700	Dec-26	73.20	-325	Dec-26	76.95
Desert SW	-775	Dec-26	72.45	-175	Dec-26	78.45
SJ Valley	-750	Dec-26	72.70	490	Dec-26	85.10
Average	-475	Dec-26	75.45	127	Dec-26	81.47
Previous day	-475	Dec-26	76.04	127	Dec-26	82.06

TRANSACTIONS REPORTED

	Bales	
	Today	Season
Southeast	366	4,153
North Delta	999	9,031
South Delta	0	613
East TX-South TX	0	54,239
West TX-KS-OK	437	13,214
Desert SW	0	546
SJ Valley	0	0
Upland Totals		
	1,802	**81,796**

AMERICAN PIMA SPOT PRICE QUOTATIONS

Color 01, Leaf 1, Staple 48	Color 02, Leaf 2, Staple 46	Color 02, Leaf 2, Staple 48
153.25	148.00	152.75

TRANSACTIONS REPORTED

Today	Season
0	**0**

ICE FUTURES US - CONTRACT NO. 2 1/

COLOR 41 LEAF 4, STAPLE 34, MIKE 35-49, STRENGTH 25 OR HIGHER

Month	*Cents per pound*			
	Today	Previous		Change
Dec-26	80.20	80.79	↓	**-0.59**
Mar-27	83.94	84.48	↓	**-0.54**
May-27	85.61	86.15	↓	**-0.54**
Jul-27	86.09	86.61	↓	**-0.52**
Oct-27	79.56	79.84	↓	**-0.28**
Dec-27	79.22	79.37	↓	**-0.15**
Mar-28	79.73	79.89	↓	**-0.16**
May-28	79.90	80.06	↓	**-0.16**
Jul-28	79.69	79.85	↓	**-0.16**
Oct-28	77.73	77.89	↓	**-0.16**

7-MARKET BASE QUOTATIONS FOR UPLAND COTTON

Season high

08/31/2026 86.52

Season low

10/01/2026 72.65

Oct 23 - Oct 29

ADJ. WORLD PRICE

65.01

CC ADJUSTMENT

0.00

FC ADJUSTMENT

2025	2026
0.00	0.00

LOAN DEFICIT PMT.

0.00

PIMA COMPETITIVENESS PAYMENT

0.00

Visalia Classing Office Quality Report for the Week Ending 10/22/2026
Visalia - Pima

Agricultural Marketing Service
Cotton Market News

October 23, 2026

Volume 10, No. 3

Email us with accessibility issues regarding this report

COLOR GRADE	Week	Season
01	47.6	50.1
02	49.3	47.5
03	3.0	2.3
04	0.1	*
05	*	*
06	-	-
07	-	-

EXTRANEOUS MATTER	Week	Season
Prep (01)	-	-
Bark (11)	-	-
Grass (21)	*	*
Spindle Twist (51)	-	-
Plastic (71)	-	*

MICRONAIRE	Week	Season
2.4 & Below	-	-
2.5-2.6	-	-
2.7-2.9	0.5	0.3
3.0-3.2	2.0	1.2
3.3-3.4	1.6	1.2
3.5-3.6	7.4	11.1
3.7-4.2	87.4	84.8
4.3-4.9	1.0	1.3
5.0-5.2	-	-
5.3 & Above	-	-
Avg Micronaire	**3.88**	**3.87**

STAPLE	Week	Season
44 & Shorter	8.3	7.7
46	11.2	14.7
48	47.6	50.7
50	32.3	26.4
52 & Longer	0.6	0.5
Avg Staple	**48.11**	**47.95**
Avg Length	**1.40**	**1.39**

LEAF GRADE	Week	Season
1	59.6	60.8
2	37.4	36.5
3	1.9	2.0
4	1.1	0.7
5	*	*
6	-	-
7	-	-
Avg Leaf	**1.45**	**1.43**
Avg Trash	**0.24**	**0.23**

STRENGTH	Week	Season
36 & Below	4.1	3.7
37	4.4	8.0
38	5.7	4.5
39	3.0	3.1
40	1.2	1.0
41	2.4	2.2
42	6.6	6.0
43	14.4	13.1
44	20.0	18.4
45	17.9	18.8
46	12.6	13.4
47	4.9	5.4
48 & Above	2.9	2.3
Avg Strength	**43.61**	**43.51**

UNIFORMITY	Week	Season
83 & Below	2.3	1.5
84	12.0	12.6
85	23.6	25.8
86	47.1	46.9
87	13.4	11.8
88 & Above	1.6	1.4
Avg Uniformity	**86.05**	**86.02**
Bales Classed	**16,341**	**26,653**
Gins	**6**	**6**

GLOBAL MARKET WEEK IN REVIEW

Outside Markets Influencing American Pima Cotton

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

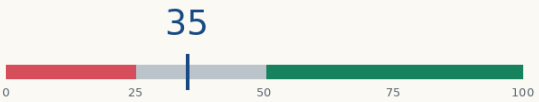
WEEK ENDING OCTOBER 23, 2026

Executive Summary

Energy and logistics costs moved higher into Oct. 23. WTI settled at $103.27/bbl, while the U.S. 10-year Treasury yield reached 4.99%. The dollar index ended at 101.81.

December cotton futures finished the week at 80.20¢/lb, up 20 points for the week. China's latest official manufacturing PMI remained in expansion at 50.1, while higher freight and a lower-priced PSF alternative remain challenges for cotton demand.

Pima Market Environment Index



NEGATIVE • COST PRESSURES RISING

Energy, freight, rates and textile price competition

Qualitative market signal; not a price forecast

GLOBAL MARKET SNAPSHOT

INDICATOR	OCT. 23 VALUE	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	**$103.27/bbl**	Up 3.8% Friday	**Mixed / cost risk**
U.S. Dollar Index (DXY)	**101.81**	Up 0.20% Friday	**Currency headwind**
Cotton (ICE Dec. 2026)	**80.20¢/lb**	Up 20 pts week	**Upland benchmark firmer**
China PSF Spot	**$0.62/lb**	Current indication	**Price advantage remains**
Ocean Freight (Drewry WCI)	**$4,585 / 40-ft**	Up 2% week	**Rising cost headwind**
U.S. 10-Year Treasury	**4.99%**	Near 5%	**Financing headwind**
China Manufacturing PMI	**50.1**	Sept.; up from 49.8	**Expansionary signal**

Competitive Position: Cost Pressures Outweigh Modest Demand Signals

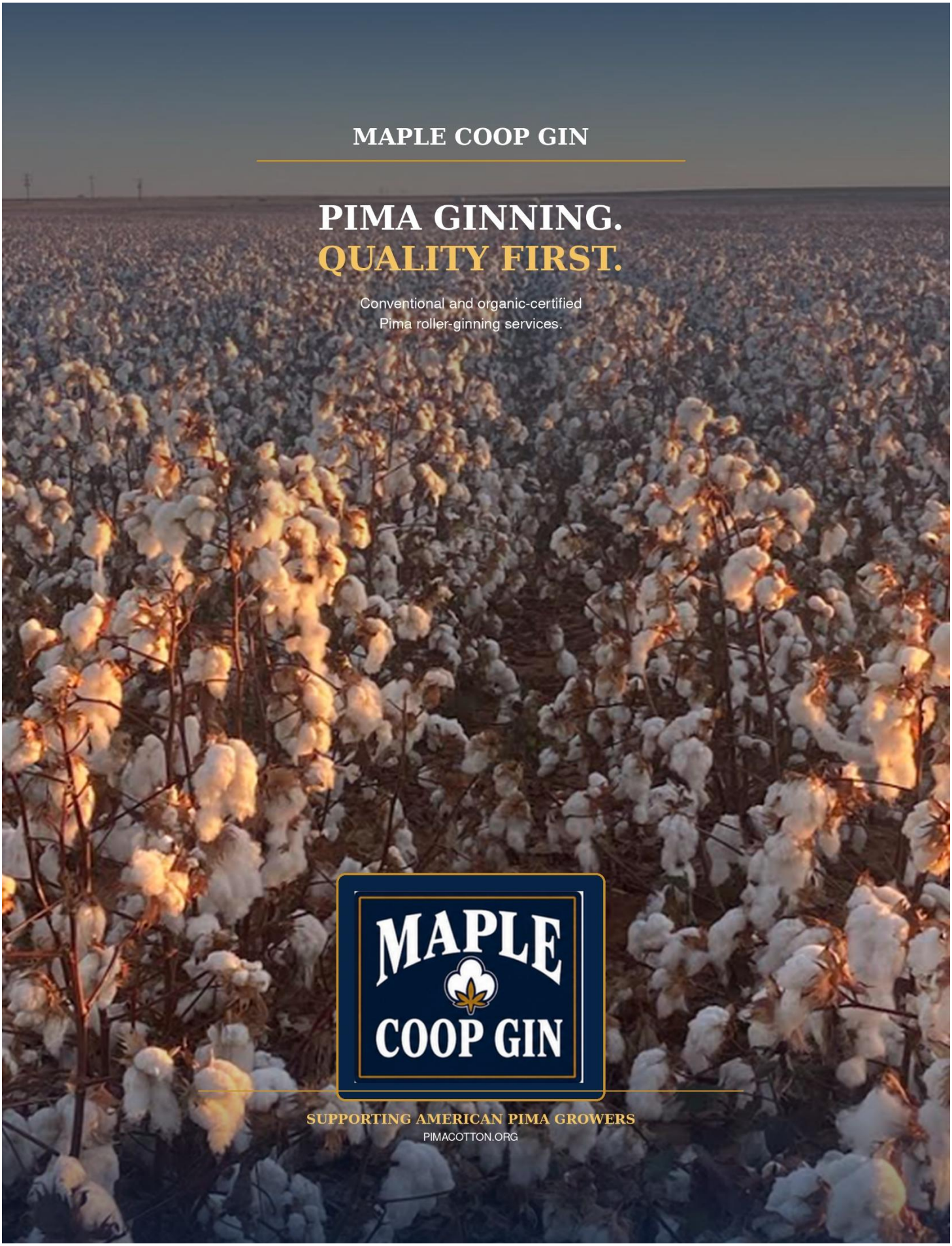
A directional read of the factors influencing American Pima, not a cotton-price forecast.

WHAT CHANGED THIS WEEK

- WTI settled at $103.27/bbl after a 3.8% Friday gain; the 10-year Treasury yield rose to 4.99%, keeping energy and financing costs in focus.
- Drewry's World Container Index rose 2% to $4,585 per 40-foot container, a 15-week high, adding pressure to export logistics costs.
- December ICE cotton closed at 80.20¢/lb, up 20 points for the week. China's September manufacturing PMI improved to 50.1, back in expansion.
- PSF was listed at $0.62/lb in the supplied Oct. 23 market snapshot. Polyester remains a lower-price competitor despite higher energy and fiber costs.

Sources: USDA-supplied market snapshot (WTI, PSF); Reuters, Oct. 23 (WTI); Texas A&M Cotton Marketing Planner, Oct. 23; Drewry WCI, Oct. 22; AP, Oct. 23 (Treasury); Investing.com, Oct. 23 (DXY); China NBS, Sept. PMI.

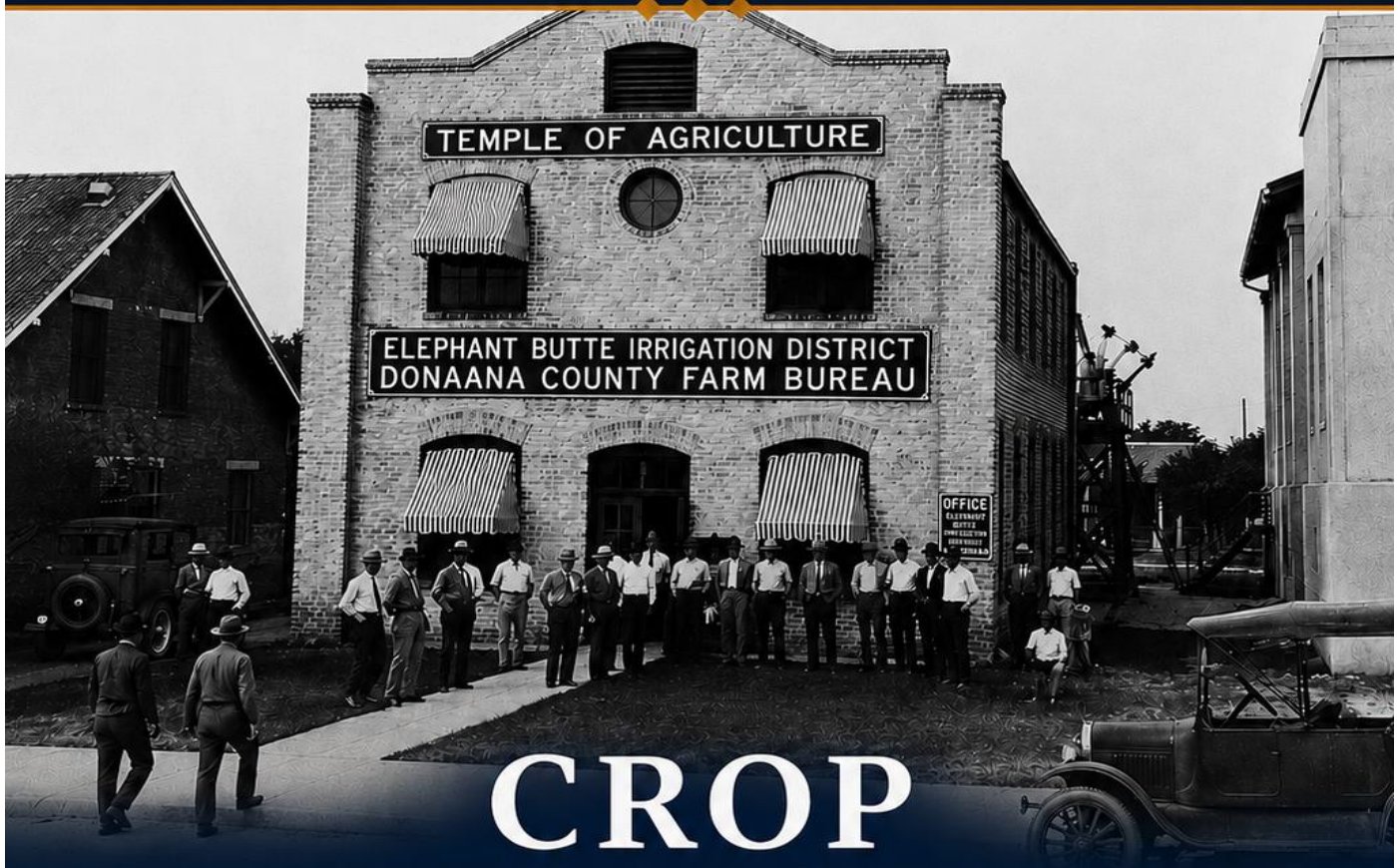

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CROP INTELLIGENCE

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 10-20-26
USDA DATA THROUGH 10-18-26

Executive Field & National Crop Summary

As of Oct. 18, 85% of the U.S. cotton crop had open bolls, four points below the five-year average. Harvest reached 41%, four points ahead of average and up 10 points in one week. Three of four USDA regions were ahead of their five-year harvest pace; the Delta and Far West were furthest advanced.

U.S. COTTON HARVEST

41% HARVESTED

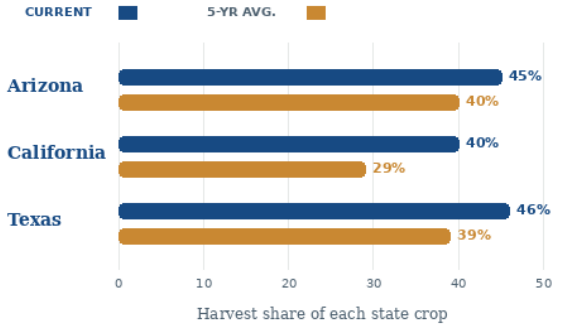
0% 100%

4 points above the 5-year average

USDA COTTON CROP PROGRESS SCORECARD

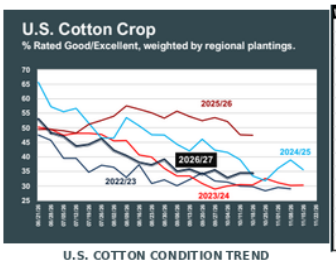
METRIC	CURRENT / 5-YR AVG.	WEEKLY CHANGE	PIMA REGION CONTEXT
U.S. BOLLS OPEN	85% / 89%	+3 PTS.	Four points below average
U.S. HARVESTED	41% / 37%	+10 PTS.	Four points ahead of average
ARIZONA	95% OPEN / 45% HARVESTED	+1 / +2 PTS.	Harvest 5 points ahead
CALIFORNIA	90% OPEN / 40% HARVESTED	+5 / +20 PTS.	Harvest 11 points ahead
TEXAS	78% OPEN / 46% HARVESTED	+3 / +8 PTS.	Harvest 7 points ahead

COTTON HARVEST VS. 5-YEAR AVERAGE



Harvest share of each state crop

NATIONAL CROP CONDITION



U.S. COTTON CONDITION TREND

WEEKLY COMPARISON

	Rated "Good" vs Previous	Rated "Excellent" vs Previous
Alabama	(6)	1
Arizona	(5)	9
Arkansas	0	0
California	0	0
Georgia	3	(1)
Kansas	(5)	0
Louisiana	0	0
Mississippi	0	0
Missouri	3	0
North Carolina	(4)	7
Oklahoma	0	0
South Carolina	2	5
Tennessee	8	3
Texas	(1)	0
Virginia	9	0

WEEKLY STATE RATING CHANGE

U.S. BOLLS OPEN

85% open vs. 89% 5-year average.

National pace is 4 points behind.

U.S. HARVEST

41% harvested vs. 37% average.

Harvest advanced 10 points this week.

PIMA-STATE HARVEST

AZ 45% • CA 40% • TX 46%

All three are ahead of 5-year averages.

PIMA GROWERS INTERPRETATION:

Arizona is nearing full boll opening at 95%, though still three points below its five-year average; harvest is five points ahead. California is ahead of average for both opening and harvest, with 40% harvested. Texas has the slowest boll opening among the three Pima states at 78%, but harvest is seven points ahead of its five-year pace. New Mexico is not listed separately in the selected-state USDA cotton table.

Source: USDA NASS, Crop Progress, released Oct. 19, 2026; week ending Oct. 18, 2026. State values compared with 2021–2025 averages.

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

October 2026 WASDE Update

Pima ending stocks fall to 83,000 bales as the crop estimate is trimmed.

REPORT DATE OCTOBER 9, 2026



EXECUTIVE SUMMARY

The October WASDE lowered the 2026/27 Pima crop estimate slightly, reducing projected ending stocks by 9,000 bales to 83,000. Ending stocks would be the lowest since the end of 2021/22, when they fell to 24,000 bales. The updated balance sheet projects 383,000 bales of production, 400,000 bales of exports, and 5,000 bales of domestic consumption.

KEY TAKEAWAYS

ENDING STOCKS
83,000 bales, down 9,000 from the prior estimate.

PRODUCTION
383,000 bales after a slight downward crop adjustment.

HISTORICAL CONTEXT
Lowest projected ending stocks since 2021/22 (24,000 bales).

DEMAND
400,000 bales of exports; 5,000 bales of domestic use.

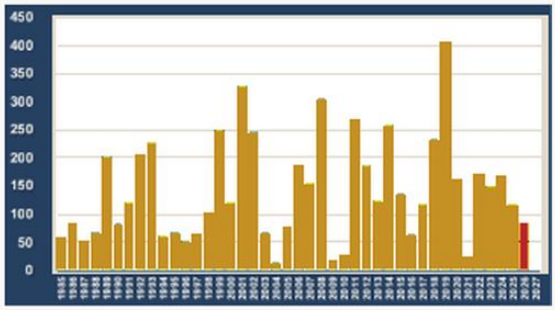
U.S. PIMA COTTON BALANCE SHEET

IN 1,000 480-LB BALES

Item	Est. 2025/26	Est. 2026/27
Beginning stocks	167	105
Production	405	383
Imports	0	0
Total supply	572	488
Consumption	5	5
Exports	462	400
Total demand	467	405
Unaccounted	0	0
Ending stocks	**105**	**83**

U.S. PIMA ENDING STOCKS

IN 1,000 480-LB BALES



BOTTOM LINE — Ending stocks fall to 83,000 bales as the crop estimate is trimmed. Lowest projection since the end of 2021/22.

Source: USDA, World Agricultural Supply and Demand Estimates (WASDE), October 9, 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.

REGIONAL WEATHER STATUS

Defoliation Weather and Harvest Readiness Across the American Pima Belt

7-day temperature outlook for California, Arizona, New Mexico and West Texas

WEEK ENDING OCTOBER 23, 2026

Executive Weather Summary

The latest USDA report (week ending Oct. 18) showed 85% of U.S. cotton bolls open, below the 89% five-year average; 41% was harvested, above the 37% average. The Far West was among the most advanced regions. California Pima is 40% harvested; Arizona, New Mexico and Texas are at defoliation and early harvest. Oct. 24–30 brings repeated storm chances to New Mexico and West Texas, with lows near 47°F around Safford and Deming. Plan field access and defoliation around crop maturity and local conditions.

REGIONAL DEFOLIATION WEATHER RISK

ELEVATED



Primary risk: Rain may restrict field access

Monitor: Cool lows, regrowth and harvest access

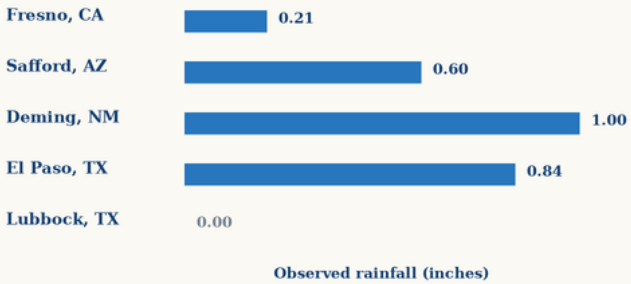
PIMA FIELD STATUS & 7-DAY FORECAST

Location	7-DAY HIGH / LOW °F	LOWEST FORECAST LOW	OUTLOOK	CROP STATUS	OCT 24-30
Fresno, CA	67–76 / 47–52	47°F	Mostly sunny; dry harvest window	**40% harvested**	
Safford, AZ	76–82 / 48–55	48°F	Mostly sunny; late-week shower chance	**Defoliation & early harvest**	
Deming, NM	73–78 / 47–52	47°F	Showers or storms possible several days	**Defoliation & early harvest**	
El Paso, TX	74–85 / 56–60	56°F	Storm chances Oct. 24–26 & 29–30	**Defoliation & early harvest**	
Lubbock, TX	66–78 / 54–62	54°F	Storms possible through Oct. 27	**Defoliation & early harvest**	

Forecast temperatures are daily high/low ranges; lowest value is the coldest overnight low in the period.

7-DAY OBSERVED RAINFALL

Station totals, Oct. 17–23 (inches)



HARVEST & DEFOLIATION STATUS

CALIFORNIA — 40% HARVESTED

Harvest is underway; preserve field access and protect mature-boll quality.

ARIZONA, NEW MEXICO & TEXAS — DEFOLIATION / EARLY HARVEST

Storm chances in New Mexico and West Texas, along with cool overnight lows, call for close field monitoring and flexible timing.

CALIFORNIA — 40% HARVESTED

40% of the crop is harvested; protect access.

ARIZONA & NEW MEXICO

Defoliation and early harvest; watch rain.

WEST TEXAS

Defoliation + early harvest; watch storms.

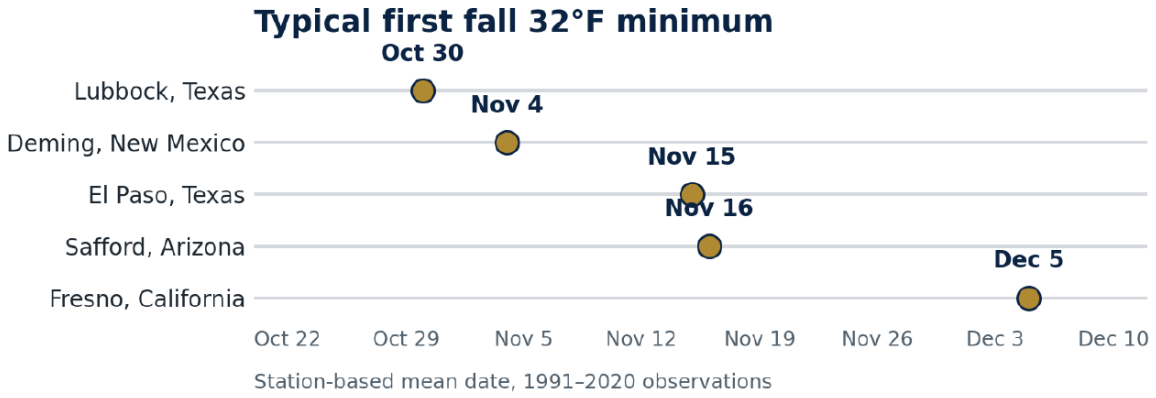
Sources: NOAA/NWS forecasts checked Oct. 24, 2026; IEM/NWS and AZMET station observations Oct. 17–23; USDA NASS Crop Progress, week ending Oct. 18; regional Pima status supplied by user.

PIMA JOURNAL
THE VOICE OF AMERICAN PIMA COTTON
INSIGHT. INTEGRITY. AMERICAN PIMA.

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

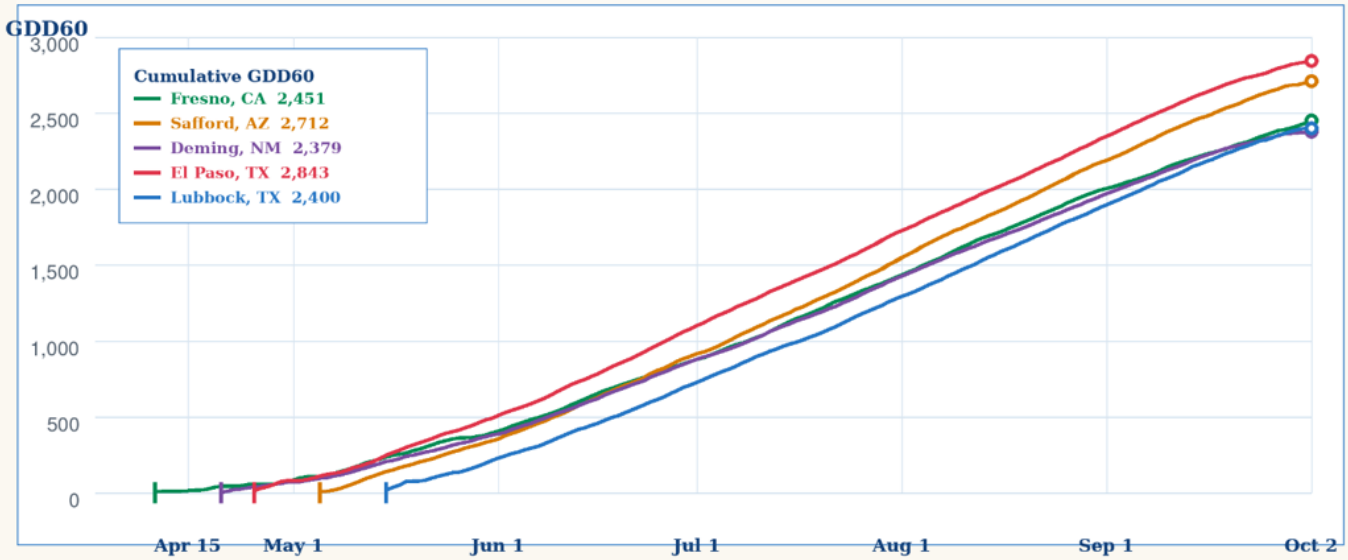
FINAL SEASON SUMMARY

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.

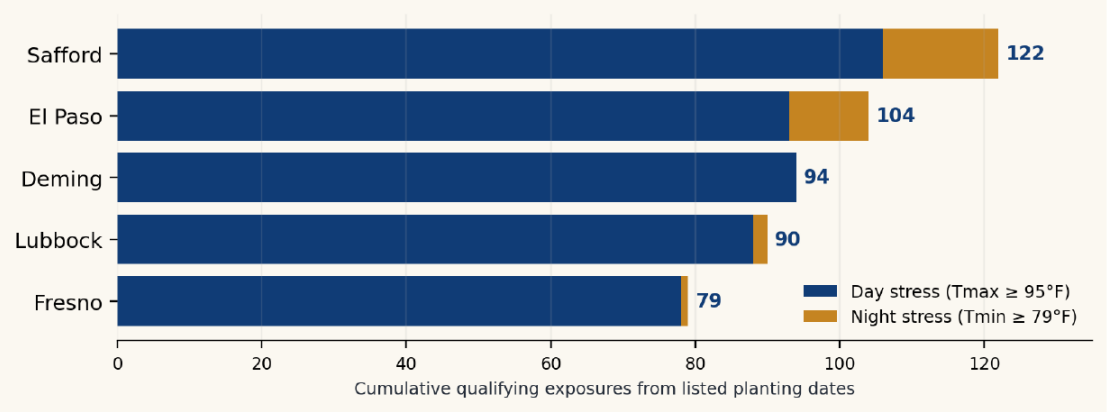
2026 PIMA REGIONAL HEAT EXPOSURE CLOSEOUT

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.

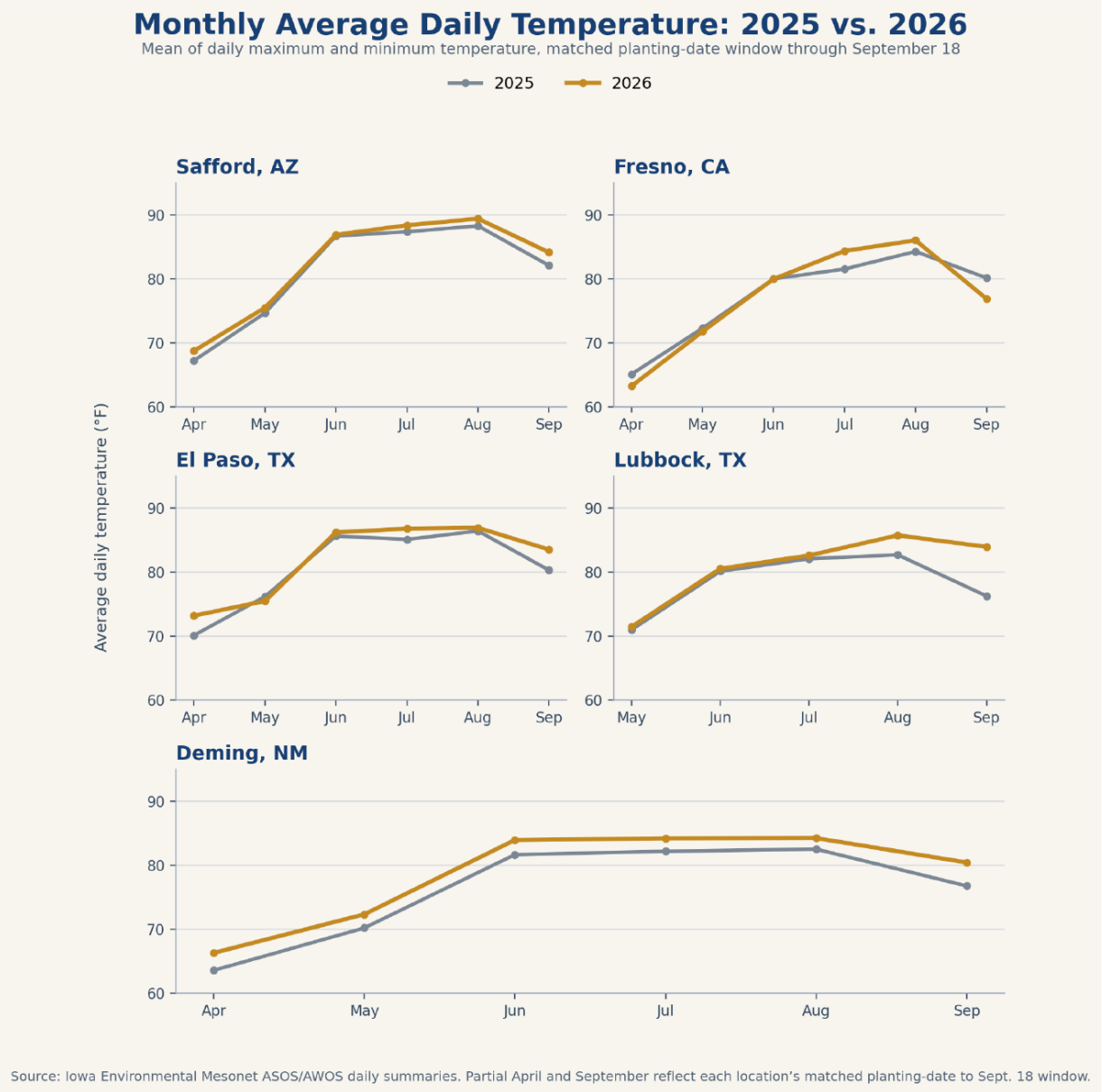
FINAL RECORD TO COMPLETE

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.

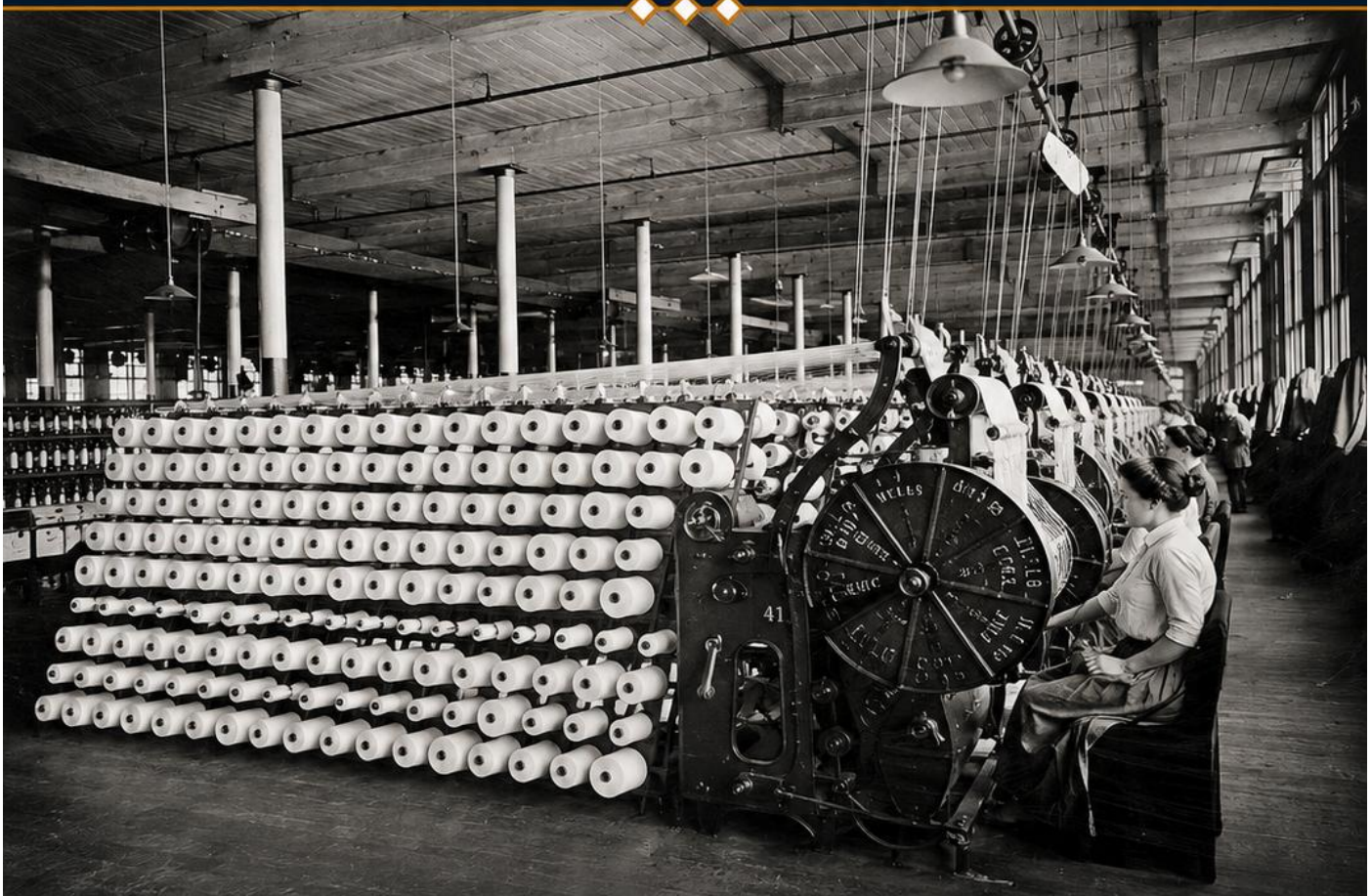


Monthly average daily temperature = mean of the daily maximum and minimum. Partial April and September reflect each location's matched planting-date to Sept. 18 window. Source: Iowa Environmental Mesonet ASOS/AWOS daily summaries.

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FIELD TO FIBER

THE JOURNEY OF PIMA® COTTON

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From Our Fields to the World.

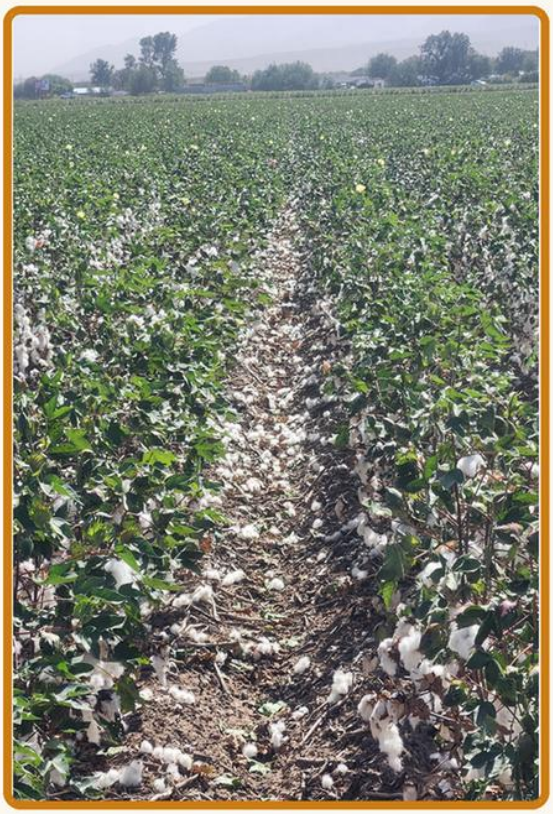
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ARIZONA UPDATE

WEEK ENDING 10-23-26



ARIZONA FIELD SUMMARY

Recent rains and strong winds have made harvesting an otherwise promising Pima crop a challenge. As harvest gets underway, we're seeing cotton on the ground, tagged-out cotton, and regrowth—none of which are desirable.

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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.

Learn more at supima.com/aqre-project | SUPIMA® WORLD'S FINEST COTTONS | Building trust. Delivering confidence. From Our Fields to the World.®



SUPIMA® WORLD'S FINEST COTTONS

The World's Finest Cotton. By Design.

SUPERIOR FIBER. SUPERIOR OUTCOMES.

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

WORLD'S FINEST FIBER

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

CERTIFIED. TRUSTED.

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

INTEGRATED. TRANSPARENT.

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

RESPONSIBLE. SUSTAINABLE.

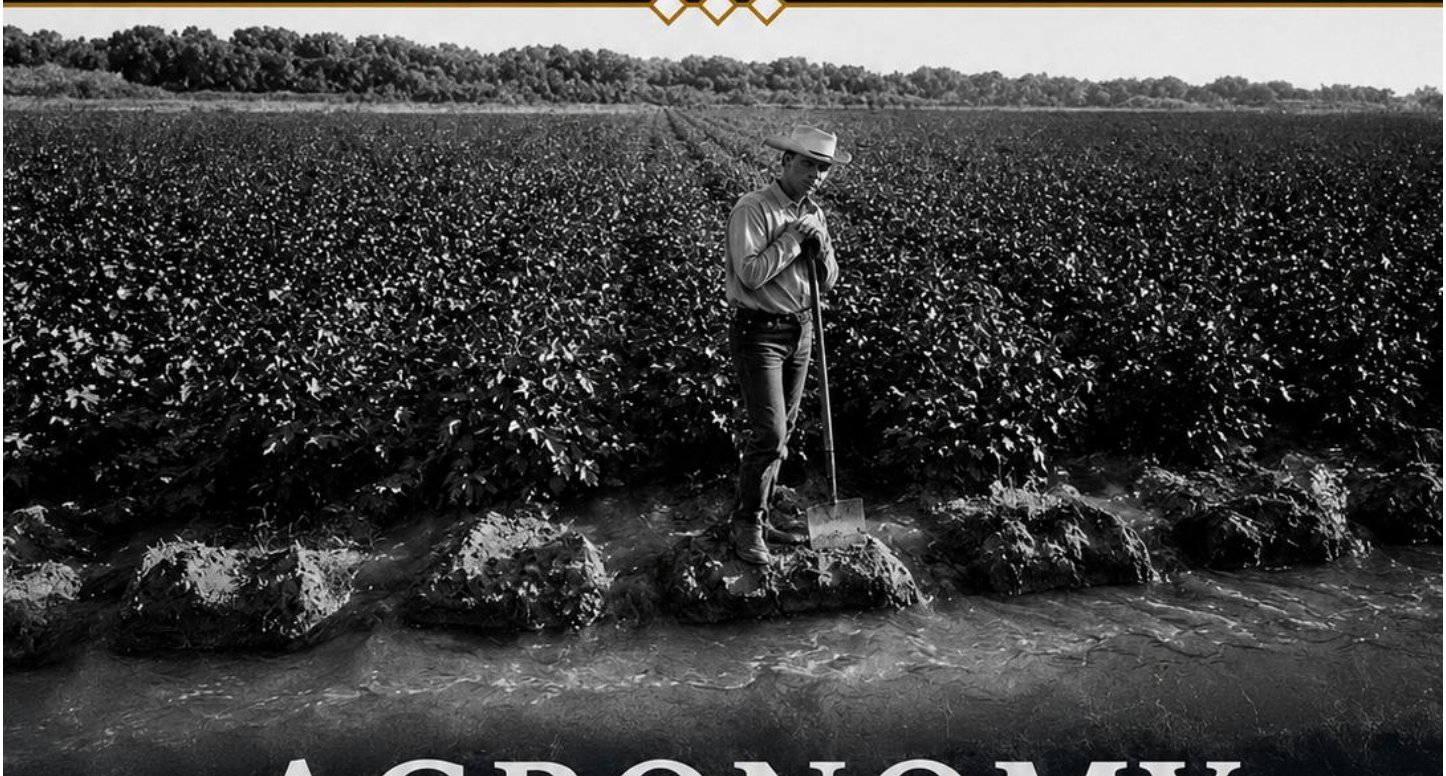
Built on stewardship, science and continuous improvement for people and the planet.

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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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SOLUTIONS THAT HELP GROWERS SUCCEED.

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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

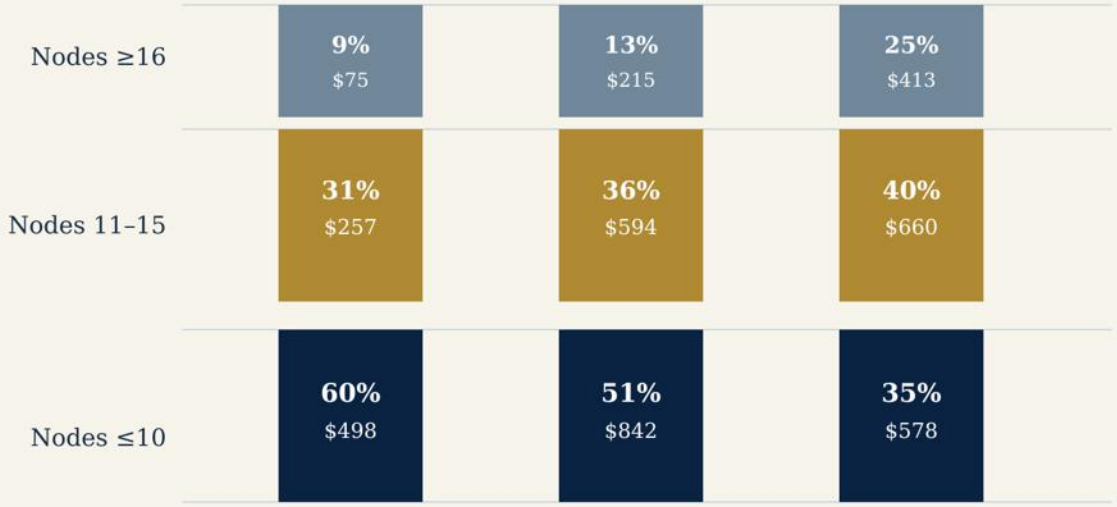
UPLAND COTTON
$0.83/lb = $830 gross fiber value

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.

CROP INTELLIGENCE | HARVEST QUALITY | OCTOBER 16, 2026

Cotton Moisture and Harvest Quality

How moisture affects fiber, storage, and value from the field to the gin



Harvested cotton modules in the field.

Moisture is one of the harvest conditions growers can manage that directly affects how well seed cotton holds up before ginning. Cotton picked or stored too wet can discolor, heat, become harder to clean, and lose value. The practical goal is to harvest dry enough for safe handling, then move the crop promptly to the gin—especially after rain or in warm weather.

Keep harvest moisture in context

A useful field benchmark is seed-cotton moisture below 12% at harvest. Treat it as a practical guide rather than a universal cutoff: readings depend on what is measured, the meter and sampling method, and local gin practices. Seed-cotton moisture in the field or a module is not the same measure as lint or bale moisture after ginning.

Bale moisture is measured at a different stage. The 6.75%–8.25% range applies to bale samples sent for classification, and about 8% is a bale target. These figures should not be used as the harvest threshold. Confirm measurement methods and handling limits with your gin or local extension specialist.

What excess moisture can do

Moisture becomes a quality risk when wet cotton remains warm or sits too long. Heating can develop in damp seed cotton, particularly inside a module where air movement is limited. This can damage seed and lint, promote yellowed color, and create storage losses. Rain and high humidity also slow field drying and delay harvest.

In a 12-week comparison of seed cotton stored at different moisture levels before ginning, the higher-moisture treatment showed poorer color and reflectance, more contamination, and larger or more frequent seed-coat neps. The comparison found no significant difference in fiber length or strength. The clearest concerns are appearance, cleanliness, seed condition, and processability.

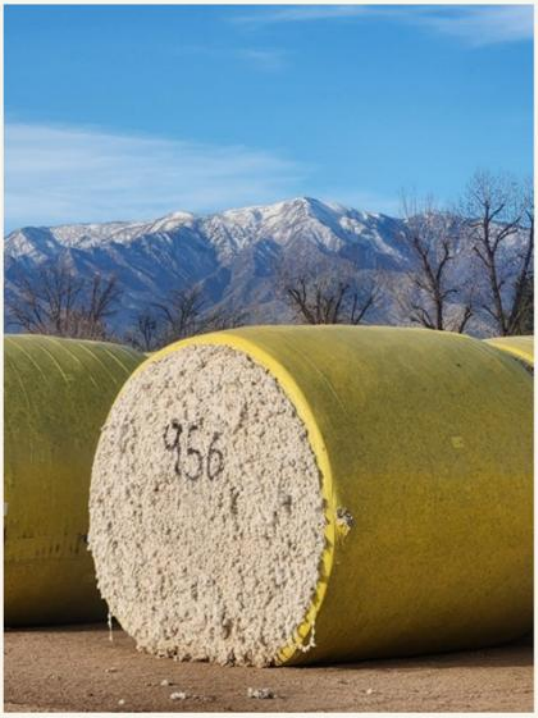
Weather, timing, and storage

Rain affects cotton in the field as well as after picking. Repeated wetting can darken exposed lint and weather the fiber. Persistent moisture around open bolls can contribute to boll rot, hard lock, and seed problems; wet conditions near harvest can also make timely picking and safe module storage harder. After rain, allow the crop to dry and assess field conditions before resuming harvest. Drying time varies with rainfall, temperature, humidity, canopy, and field conditions.

Once picked, avoid leaving wet seed cotton in a module. Seed cotton above the 12% benchmark can deteriorate quickly if stored for more than 24 hours. This is a caution, not a guarantee that cotton below that level is safe or that all cotton above it will fail. If cotton is wet, warm, or the reading is uncertain, contact the gin and arrange prompt handling. Monitor module temperature; immediate ginning is advised if a module rises 20°F above ambient or reaches 120°F.

A practical moisture check

- **Check representative spots.** Moisture can differ across fields and within a field, especially in shaded, poorly drained, or unevenly drying areas.
- **Use a suitable moisture meter.** Follow its sampling instructions, compare readings with the gin's requirements, and account for dew, recent rainfall, and time of day.
- **Let dew dry and avoid harvesting immediately after rain.** Recheck conditions instead of relying on one reading or a fixed number of days.
- **Plan module placement.** Choose a well-drained site, protect modules from rain, and avoid delays between harvest and ginning when cotton is damp.
- **Coordinate with the gin.** Confirm receiving limits, capacity, and whether a wet load can be ginned promptly.



Cotton being harvested in the field.

HARVEST MOISTURE AT A GLANCE

Below 12%

Practical seed-cotton harvest benchmark. Confirm the measurement method with your gin.

AFTER RAIN
Let the crop dry and recheck field conditions.

IN STORAGE
Protect modules from rain and monitor for warming.

AT THE GIN
Arrange prompt handling when cotton is damp or warming.

MODULE TEMPERATURE
Immediate ginning is advised at 120°F or 20°F above ambient.

PROTECT QUALITY BY MANAGING TIME AND MOISTURE

Let the crop dry in the field, measure carefully, protect harvested cotton from additional wetting, and shorten the time damp cotton waits before ginning. Use the right moisture threshold for the right measurement, and confirm local handling guidance with your gin.

SOURCE "Moisture Levels and Cotton Harvest Quality," CottonGins.org, August 19, 2025.

COTTON DEFOLIATION: TEMPERATURE, MATERIAL, TIMING

A seven-day Pima cotton forecast screen for Fresno, Safford, Deming, El Paso and Lubbock

TEMPERATURE WINDOW: OCTOBER 16–22, 2026 • OBSERVED THROUGH OCTOBER 16

Late-season rains have kept growers out of the field and spurred regrowth in many Southwest cotton fields. Now a cold front is moving in, likely limiting the efficacy of many of the strongest defoliants. Adaptability will be key to a successful harvest this year. The Oct. 16–22 forecast screen shows the clearest consecutive warm-night windows in El Paso and Deming. Fresno has no three-night run at or above the table's 55°F estimate; Safford and Lubbock have shorter windows. Check field maturity and product labels before setting treatment timing.

READ THE TABLE AS A PERFORMANCE SCREEN

These temperatures are estimates—not legal label cutoffs or guarantees. Labels, local registration, crop maturity, weather after application and field conditions still govern.

ESTIMATED MINIMUM TEMPERATURES IN THE SUPPLIED TABLE

Estimated minimum	Materials listed in the reference
65°F	Thidiazuron SC
60°F	Ginstar / Cutout / Adios • Folex 6 • Ethephon • Finish 6 Pro
55°F	Aim • Display • ETX • Reviton • Sharpen • Paraquat • Sodium chlorate

COOL NIGHTS SLOW RESPONSE

Warm days help, but the lows surrounding treatment matter. Extension guidance notes that activity of many harvest aids slows when nights stay below about 60°F. Thidiazuron is especially temperature-sensitive; repeated cool nights can delay leaf drop and weaken regrowth control. A single forecast low above a material's estimate is not a dependable treatment window if the next nights fall sharply.

PIMA MATURITY COMES FIRST

UC IPM guidance calls for field-by-field timing. As a California Pima reference, it gives 3–4 nodes above cracked boll (NACB) as the target for first defoliant timing and 60% open bolls as a general threshold. Confirm maturity and harvest timing in each field before using the temperature screen.

MATERIALS DO DIFFER

Thidiazuron SC is the most temperature-sensitive item in the supplied table (65°F). Ginstar/Cutout/Adios combine thidiazuron with diuron and are assigned a 60°F estimate there. Folex 6 is listed at 60°F. Ethephon is primarily a boll opener; Finish 6 Pro combines ethephon with cyclanilide. Treat their 60°F entries as the supplied table's temperature guidance, not as an instruction to use a product outside its label.

IMPORTANT LABEL AND MIXING CHECK

The attachment notes that adjuvants may help under cool or drought-stressed conditions but can increase leaf desiccation in warm weather. UC IPM also warns that ethephon and sodium chlorate mixtures can release chlorine fumes. Do not tank mix sodium chlorate with ethephon; follow every product label and the most restrictive tank-mix directions.

A PRACTICAL DECISION SEQUENCE

1 CONFIRM MATURITY

Check NACB, open bolls, regrowth and harvest schedule field by field.

2 SCREEN THE NIGHTS

Compare the full run of forecast lows with the supplied material estimates.

3 CHECK THE LABEL

Verify local registration, crop stage, weather limits and harvest method.

References: Supplied Pima Growers harvest-aid table; UC IPM, Cotton Pest Management Guidelines, "Scheduling Defoliation"; NC State Extension, 2026 Cotton Information, "Cotton Defoliation"; UC IPM, "Harvest Aid Chemicals."

THE FORECAST: WHERE THE TEMPERATURE WINDOWS FALL

Nighttime lows (°F) | October 16–22, 2026

Fri. Oct. 16 observed; Oct. 17–22 forecast • Cells: below 55°F • 55–59°F • 60–64°F • 65°F and above

Location	Fri 16*	Sat 17	Sun 18	Mon 19	Tue 20	Wed 21	Thu 22
Fresno	53°	55°	54°	52°	55°	57°	54°
Safford	57°	57°	59°	61°	65°	64°	53°
Deming	48°	46°	53°	55°	60°	62°	53°
El Paso	50°	50°	56°	59°	63°	63°	61°
Lubbock	40°	39°	46°	48°	53°	56°	61°

TEMPERATURE-SCREENED PLAN BY LOCATION

Location	Forecast signal	Temperature-based plan
Fresno	Observed 53° Oct. 16; forecast lows are 55°, 54°, 52°, 55°, 57° and 54°.	No three-night run at or above 55°F. Highs are forecast at 68–94°F. Recheck conditions and field maturity before timing a pass; follow label requirements and maintain the required rain-free interval.
Safford	One forecast 65° low (Oct. 20); other lows range from 53° to 64°.	A single 65°F night does not provide a sustained warm window. Most nights remain in the 55–64°F groups, followed by 53°. Watch showers and wind; reassess before application.
Deming	Three consecutive forecast lows of 55°, 60° and 62° (Oct. 19–21).	A short 55°F-group window appears Oct. 19–21, but no night reaches 65°F. The forecast then falls to 53°; verify the field forecast, maturity, wind and dry interval.
El Paso	Four consecutive forecast lows of 59–63°F (Oct. 19–22).	The strongest 55°F-group window is Oct. 19–22; no night reaches 65°F. Showers are possible during this stretch, so confirm a suitable dry interval and label conditions.
Lubbock	Only two late-period lows reach 55°F or above; only Oct. 22 reaches 60°F.	No sustained temperature window is forecast. Lows fall to 39–53°F through Oct. 20, then rise to 56° and 61°. Recheck after the cold snap and avoid forcing an application into poor conditions.

FIELD DECISION GATES

1. Recheck the field-level forecast 24–48 hours before spraying; city lows are not field measurements. 2. Evaluate several nights around application, not only the first low. 3. Confirm Pima maturity, coverage, wind, rain-free interval, harvest method and label restrictions. 4. The table's 55/60/65°F groups are comparative estimates, not product-specific application permission.

Forecasts for Oct. 17–22 retrieved Oct. 17; Oct. 16 station lows from IEM shown for context.
Temperature groups are comparative screening estimates, not product-specific permissions. Forecast source: location point forecasts.
Guidance: UC IPM, "Harvest Aid Chemicals"; NC State Extension, 2026 Cotton Information, "Cotton Defoliation"; Texas A&M AgriLife.
Follow each product label.

COTTON DEFOLIATION

Timing, Physiology and Harvest-Aid Decisions for American Pima



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.

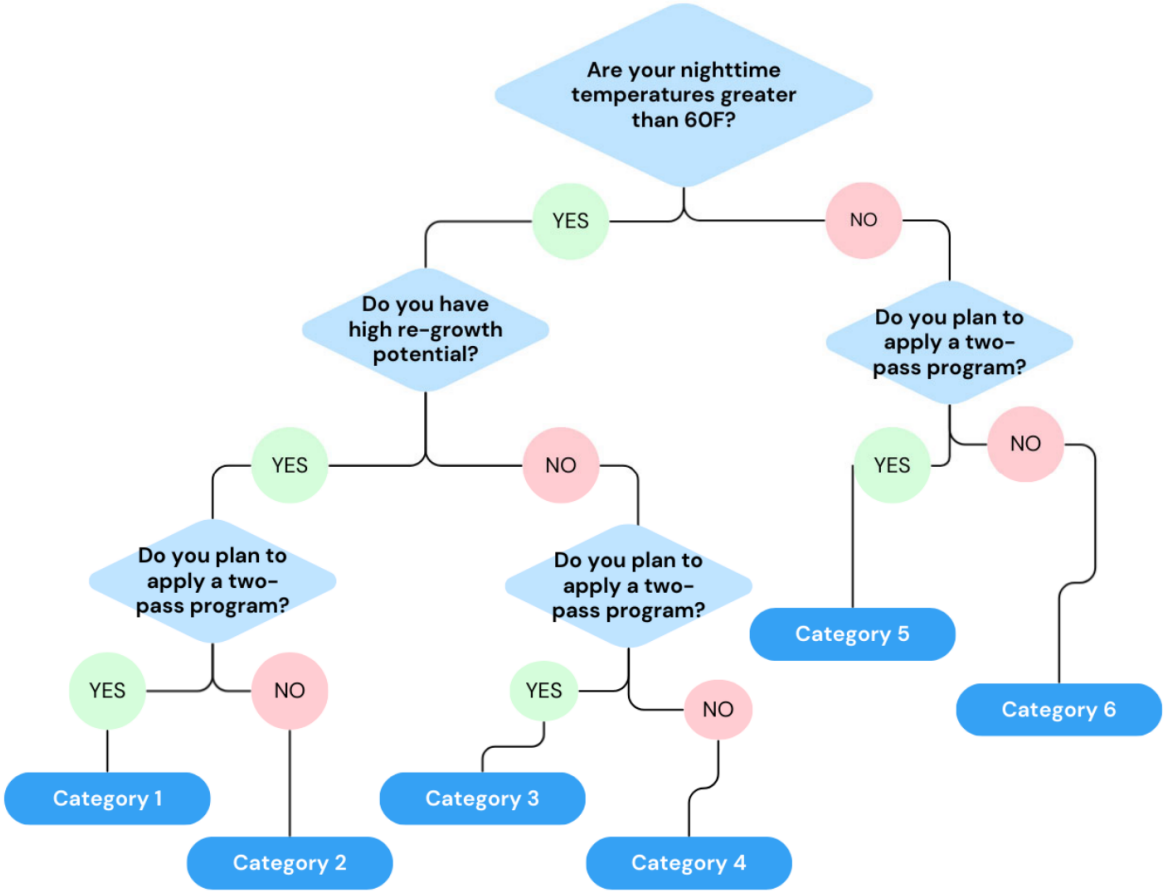
[2] Expected rainfree periods are estimates only and may or may not be exact. Other conditions, including temperature, moisture, and crop status, will play a role in product performance.

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

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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

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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.


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BRIEF NO. 17 FIBER & RAW MATERIALS

American Cotton Just Got a Customer

Forty years of export marketing never gave a foreign spinner a financial reason to buy American cotton. This does.

THE MECHANISM

For forty years the US has been trying to sell more cotton overseas. This may be the thing that does it.

The Section 301 action directs USTR to establish tariff-rate quotas for Bangladesh, Cambodia, Indonesia, and Malaysia, sized according to each country's imports of US textile goods and US cotton. Qualifying volumes enter the US free of the new duty.

Read that as a purchase requirement with a rebate attached.

WHY THIS IS DIFFERENT FROM EVERY PREVIOUS EFFORT

US cotton has been marketed abroad for decades. Cotton Council International, trade missions, quality seminars, the Cotton USA mark. Real work with real results and none of it ever gave a foreign spinner a financial reason to specify American fiber over Brazilian or Australian.

This does. A Bangladeshi mill buying US cotton now produces yarn that lets its garment customer clear US customs without the duty. The value of that concession flows backward through the chain to the fiber decision.

THE SIZE OF IT

Bangladesh alone shipped $9.04 billion in apparel to the US in the fiscal year ended 30 June, up about 4% even as its total apparel exports fell 1.64% to $38.7 billion. Add Cambodia, Indonesia, and Malaysia.

If a meaningful share of that volume shifts to US cotton, the demand effect on the American crop is larger than anything the domestic market has produced in years.

> Read that as a purchase requirement with a rebate attached.

THE PROBLEMS

Volumes are not published. Until USTR issues the Federal Register notice setting quota levels, the opportunity cannot be sized.

Logistics. Moving US cotton to Chittagong is a real supply chain with real costs, and it competes against Indian cotton sitting a short haul away.

Verification. Proving US origin fiber in a finished garment means documented chain of custody through the spinner, and spinners blend bales. Segregating a US-origin lay-down costs efficiency, and that cost lands somewhere.

Price. If four countries are suddenly bidding for US cotton against a quota incentive, the basis moves. American growers benefit. American spinners buying the same fiber do not.

WHAT GROWERS AND MERCHANTS SHOULD DO

Talk to your customers in those four markets now. The mills that lock in supply relationships before the volumes are published will be positioned when they are.

Get your documentation architecture in place. Whatever verification standard USTR sets, the merchants who can already prove origin will win the business.


RETAIL SALES ROSE.
SO DID THE COST OF BUYING ANYTHING.
GAS
Higher receipts. Where are the orders?
SEPTEMBER 2026 • RETAIL SALES • CPI • PPI

Retail Sales Rose. So Did the Cost of Buying Anything.

Robert Antoshak

Today, I'm ranting about U.S. retail sales, which rose 0.8% in September, giving the enthusiasts another chance to celebrate the American consumer. Before any apparel supplier starts holding capacity for the holidays, somebody should read the inflation reports that landed the same week. Spending more is easy when everything costs more. Getting more for your money is harder, and anyone who's filled a gas tank lately can explain the difference without an economics degree.

Follow the money and most of it ended up at the pump, where sales jumped 6.4%. Strip out gas stations and the gain shrinks to 0.2%. Clothing stores didn't budge. The gas station had a better month than the clothing store.

Flat sales might pass for steady if clothes cost what they did a year ago. They cost 3.4% more, while consumer prices overall climbed 3.7%. When a store takes in the same money for pricier goods, I start wondering how many fewer garments went out the door. That's the number a mill cares about. A factory needs pieces to sew, whatever happens to the price tag.

I'll grant the comparison is rough. Store sales count one kind of retailer and the apparel price index tracks clothing sold everywhere, so subtracting one from the other won't give you garment volume. Plenty of clothing also moves through department stores, which had a decent month at 1.6%. Still, I'd want to see units before believing anyone's closet is filling up.

Then look at the paycheck. A family spending more at the pump has less left for a new jacket unless wages keep up, and in September they fell behind. Inflation-adjusted hourly pay dropped 0.5%.

Getting that jacket onto a shelf costs more, too. The same week's producer price report showed freight and warehousing up 3.4% in a single month. Retailers pinched at the register can't push all of that onto shoppers, so the call goes back to the supplier. Anyone who's sat across from a buyer knows how it ends: surely you can find another few cents.

Apparently, factory efficiency has no upper limit. Buyers want a lower price. They also want the supplier to carry the inventory and hold production space open until they're ready to commit. A cheerful retail headline won't cover any of that when the purchase order shows up late, or smaller than promised.

Before asking a mill or garment maker to gear up for growth, show it unit sales and firm orders. Tell it what's moving at full price and what's headed for the markdown rack. Maybe the holiday season proves me wrong. For now, I don't see more work coming to the factory floor. That 0.8% is mostly a gas receipt.



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.

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AMERICA'S FINEST COTTON



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COLLABORATE • INNOVATE • SUCCEED

Stronger Together. Building the Future of American Pima Cotton.

STRATEGIC COLLABORATION | INNOVATION LEADERSHIP | GROWER SUPPORT | MARKET GROWTH | QUALITY ASSURANCE | GLOBAL CONNECTIONS

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COTTON MARKETING SERVICES

MANAGE RISKS. MAXIMIZE RETURNS.

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



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

WAREHOUSING & LOGISTICS
Strategically located facilities and logistics solutions worldwide.

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

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

CONNECTING AMERICAN COTTON TO THE WORLD'S TEXTILE MILLS

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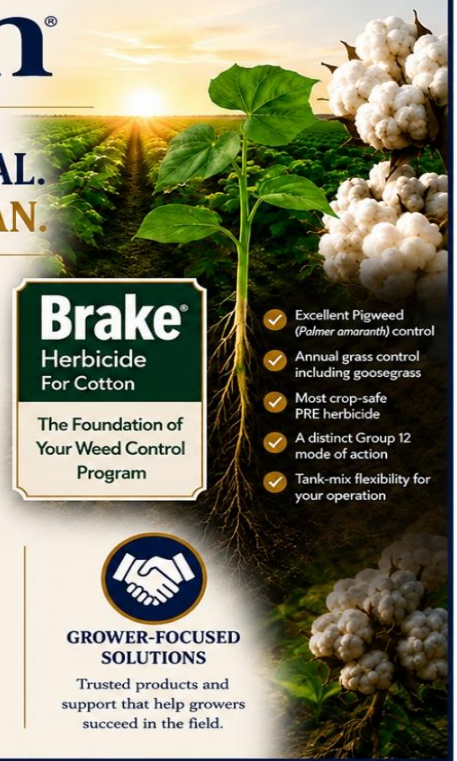
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Gowan®

PROTECT YIELD POTENTIAL. START CLEAN. STAY CLEAN.

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



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

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

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

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

HELPING COTTON GROWERS BUILD STRONGER CROPS FROM PLANTING TO HARVEST

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GOWAN COTTON COMPANY

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

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



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

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

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

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

ADVANCING AMERICAN COTTON THROUGH HYBRID ELS INNOVATION

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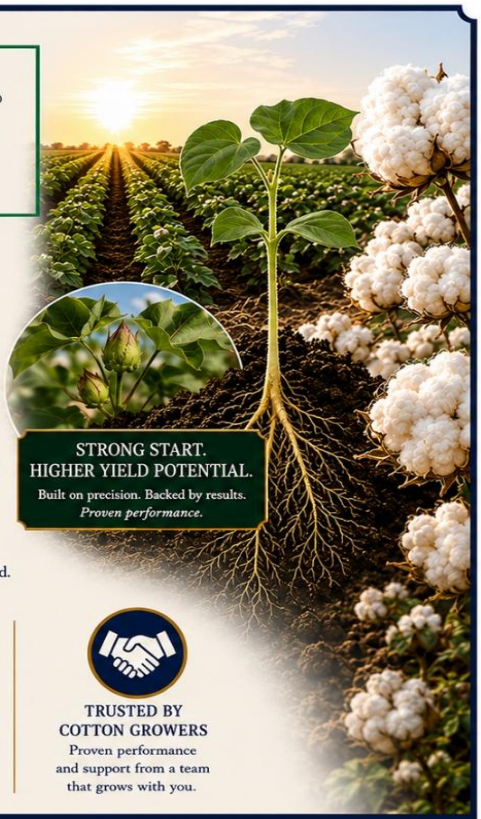
AMERICA'S FINEST COTTON

AgLogic®
Proven Maximum Performance

START STRONG. FINISH STRONG.

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

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



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

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

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

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

HELPING COTTON GROWERS MAXIMIZE PERFORMANCE FROM PLANTING TO HARVEST

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MAPLE COOP GIN

PROUD PARTNER. QUALITY FIRST.

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



QUALITY FOCUSED

Committed to delivering premium fiber quality.

GROWER PARTNERED

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

EFFICIENT OPERATIONS

Modern equipment and experienced teams for peak performance.

INTEGRITY DRIVEN

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

SUPPORTING AMERICAN PIMA GROWERS AND DELIVERING PREMIUM QUALITY.

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BROWNFIELD Farmers
SAW & ROLLER GIN



GROWER OWNED. QUALITY DELIVERED.

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



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

PREMIUM FIBER QUALITY

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

STATE-OF-THE-ART OPERATIONS

Modern equipment and proven processes ensure consistent, premium results.

GROWER OWNED COOPERATIVE

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

SERVING YOU CAN COUNT ON

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

DEDICATED TO GROWERS. COMMITTED TO QUALITY. DELIVERING VALUE.

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OUR MISSION

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

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

WHY MEMBERSHIP MATTERS

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

MEMBERSHIP LEVELS

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$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

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