PIMA GROWERS

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

WEEK ENDING OCTOBER 30, 2026



FEATURE ARTICLE & UPCOMING EVENT

COTTON • PRICE & PREMIUM

Cotton Prices Fell Back. Pima's Premium Stayed Wide.

2016–20 vs. 2021–25: Upland +23%; Pima +72%; Pima premium +156%.

The article examines how the post-pandemic supply-chain reset reshaped cotton's relative value.

UPCOMING CONFERENCE • LUBBOCK

Southwest Cotton Physiology Conference

February 9–11, 2027 • 1102 E FM 1294, Lubbock, TX 79403.

Program topics include heat stress, regional water sources, seed quality and extra-long-staple opportunities. Register at tpma.eventsmart.com.

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

CONTACT

Rick Neuenschwander, Director, PCIA / Pima Growers
806-200-2581
neuenschwanderick@gmail.com

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PIMA GROWERS

THE PIMA FIELD & MARKET JOURNAL

THE WEEK IN PIMA

Executive summary • Feature stories, fiber prices & market moves

WEEK ENDING OCTOBER 30, 2026



PRICE & MARKET MOVES

SELECTED READINGS • WEEK ENDING OCT. 30

Upland Dec. 2026 avg.	**$0.7783/lb**	USDA basis
American Pima spot	**$1.5275/lb**	USDA 2-2-48
Pima landed, SE Asia	**$1.88/lb**	Cotton Outlook
Organic Pima	**$2.25/lb**	Current trading
Pima/Upland spread	**$0.75/lb**	7¢ below 5-year avg.
WTI crude oil	**$104.12/bbl**	WTI
Polyester staple fiber	**$0.58/lb**	China PSF
Giza 94, SE Asia	**$1.46/lb**	Egypt

FEATURE ARTICLES

COTTON • PRICE & PREMIUM

Cotton Prices Fell Back. Pima's Premium Stayed Wide.

Five-year averages show Upland prices rising 23%, Pima 72%, and the Pima premium 156% from 2016–20 to 2021–25. The article examines how the post-pandemic supply-chain reset reshaped cotton's relative value.

UPCOMING EVENT • LUBBOCK

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February 9–11, 2027 • 1102 E FM 1294, Lubbock, Texas. Program topics include heat stress, regional water sources, seed quality and extra-long-staple opportunities. Register at tpma.eventsmart.com.

ALSO IN THIS JOURNAL Cotton price analysis • Pima supply outlook • Supima export sales • U.S. crop progress • Weather and harvest

PIMA & CROP SIGNALS

383,000
BALES • 2026 PIMA CROP
137,000 acres projected.

83,000
BALES • 2026/27 ENDING STOCKS
Projected carryout.

206.4K RB
SUPIMA COMMITMENTS
+49.0% year over year.

52%
U.S. COTTON HARVESTED
7 points above 5-year avg.

Pima spot held at $1.5275/lb; the current Pima/Upland spread was $0.75/lb, below its $0.82 five-year average.

Sources: Pima Growers Oct. 30 market snapshot; USDA AMS quotations; Supima Week 12 Export Sales, week ending Oct. 22; USDA NASS Crop Progress, week ending Oct. 25; Southwest Cotton Physiology Conference.

COTTON | PRICE & PREMIUM

Cotton Prices Fell Back. Pima's Premium Stayed Wide.

A five-year comparison shows how the market reset after the global response to COVID disrupted supply chains and shifted supply and demand.

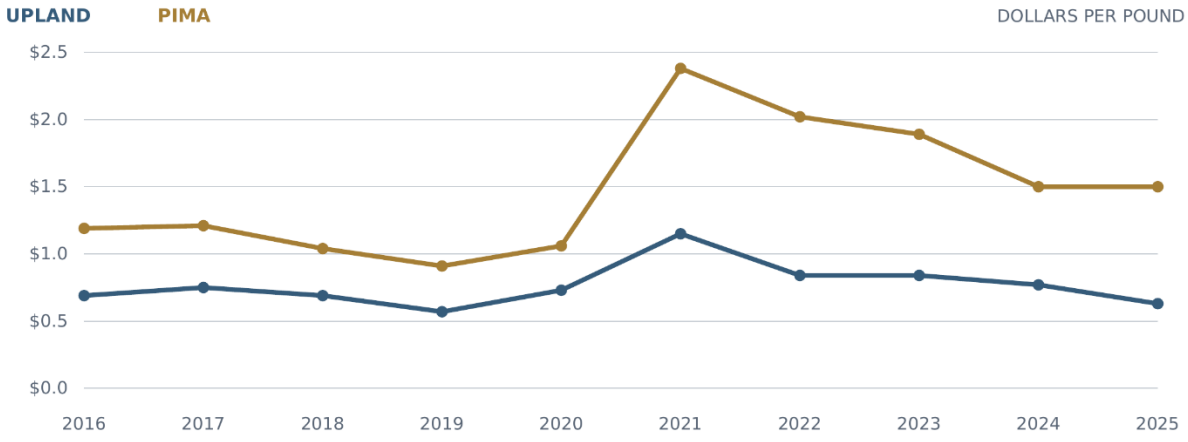
BY PIMA GROWERS | OCTOBER 2026

From 2016 through 2020, prices moved in a relatively narrow range. In the five years that followed, both markets rose on average, with the most dramatic jump arriving in 2021.

The focus is the market's adjustment to the global response to COVID: disrupted production and freight, sharp shifts in demand and inventories, and later pressure on energy and farm inputs. These series show the price pattern; they do not isolate each force.

UPLAND AVERAGE	PIMA AVERAGE	PIMA PREMIUM
$0.69 → $0.85 +23%	$1.08 → $1.86 +72%	$0.40 → $1.01 +156%
2016–20 to 2021–25	2016–20 to 2021–25	2016–20 to 2021–25

The ten-year price path



Annual price series supplied for this analysis. The two periods use simple five-year averages; 2026 is excluded from the historical comparison.

THE FIVE-YEAR COMPARISON

A wider gap, even after the peak

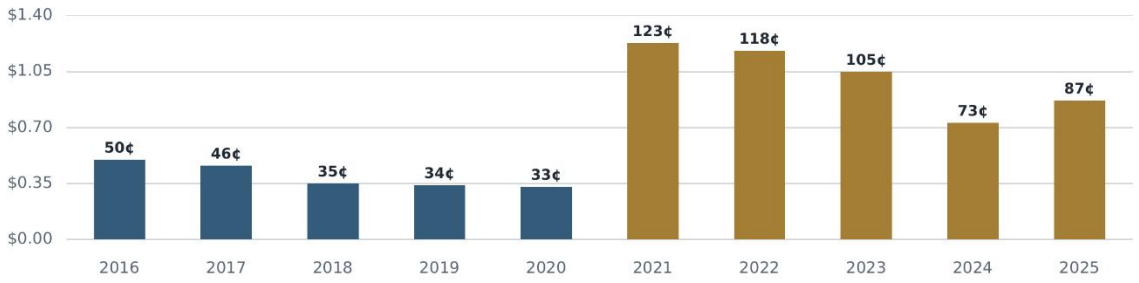
The post-2020 window includes an exceptional price spike in 2021, followed by several years of decline. That sequence matters: the averages rose in both markets, but Pima's increase was much larger and the price gap stayed wider than it had been before the market break.

Five-year averages and changes

PRICE SERIES	2016–2020 AVG.	2021–2025 AVG.	CHANGE
Upland	$0.686	$0.846	+23%
Pima	$1.082	$1.858	+72%
Pima–Upland spread	$0.396	$1.012	+156%

The Pima–Upland spread, by year

SPREAD = PIMA PRICE MINUS UPLAND PRICE | LABELS IN CENTS PER POUND



The spread is the Pima price minus the Upland price for the same year. It was 33¢ to 50¢ per pound from 2016 through 2020, jumped to $1.23 in 2021, then narrowed to 73¢ in 2024 and 87¢ in 2025.

A 2026 CHECK-IN

Upland $0.81/lb **Pima $1.53/lb** **SPREAD $0.72/lb**

Current prices provided for 2026, not full-year averages. The spread is below the 2021–2025 average, while both quotes remain above their 2016–2020 averages.

PIMA (ELS) ENDING STOCKS | 480-LB BALES

105,000 (2025/26) → 83,000 (2026/27 projected) **DOWN 21%**

Note: Nominal dollars/lb; historical averages are simple means. Pima stocks are user-provided estimates.
Context: USDA Cotton and Wool Outlook, Oct. 2026 (all-cotton balance); Cotlook long-staple outlook.

SUPPLY | ORIGIN | DEMAND | FINANCIAL CONDITIONS

Why the gap widened after 2020

The most likely explanation is a Pima-specific availability shock layered onto a broad cotton rally. Pandemic-era demand and logistics were the trigger; tight origin stocks and a delayed crop response made the Pima premium unusually sensitive.

ANNUAL PRICE ($/LB)	2020	2021	CHANGE
Upland	$0.73	$1.15	+$0.42
Pima	$1.06	$2.38	+$1.32
Pima–Upland spread	$0.33	$1.23	+$0.90

The final column is the 2021 value minus the 2020 value; spread = Pima price minus Upland price.

1 | TIGHT STOCKS MET A SHARP ACREAGE CUT

USDA estimated 142,000 American Pima acres in 2021, down 30% from 2020. Cotlook reported that as demand recovered, unsold U.S. Pima stocks fell nearly two-thirds by July 2021 and supplies at origin were nearly exhausted by the end of 2021/22. Exports declined with available supply. The delayed crop response was uneven: Cotlook later expected harvested area to rise, but water shortages cut yield prospects.

2 | FREIGHT MADE PROMPT COTTON MORE VALUABLE

Months of hand-to-mouth buying left supply-chain pipelines thin when demand returned. Persistent freight disruption added a premium for cotton that could ship quickly.

> **In a smaller, specialized Pima market, delivery timing and available origin stocks can matter more than the broad cotton balance alone.**

3 | MILLS HAD LIMITED SUBSTITUTES

Pima competes with Egyptian and Chinese long-staple cotton, but specifications limit switching. Supima-branded programs add another constraint: products carrying the mark require American-grown Pima sourced through an authorized, traceable supply chain. Those orders cannot switch to foreign long-staple, longer-staple Upland, or cellulosic blends and retain the same Supima claim. This can make branded demand less price-elastic when U.S. stocks tighten, even as unbranded programs may adjust blends.

4 | MACRO AND FUTURES REPRICING PULLED BACK

Cotlook linked the 2022 reversal to recession fears and speculative selling in Cotton No. 2 futures: the new-crop contract lost more than 42 cents in about nine weeks; the Cotlook A Index fell more than 50 cents. Pima also turned down, but more gently. Inflation, higher rates, and weaker textile demand pushed mills to draw stocks and alter blends. This helps explain the spread's decline from its 2021 peak while staying above its earlier range.

WHAT THE 2026 CHECK-IN SAYS

At $0.81 Upland and $1.53 Pima, the $0.72 spread is below the 2021–2025 average of $1.01 but above the 2016–2020 average of $0.40. The supplied Pima ELS stocks series falls from 105,000 bales in 2025/26 to a projected 83,000 in 2026/27, a 21% decline. The snapshot and stock projection cover different time frames: tighter stocks could support Pima's premium, but do not guarantee it. Watch Pima output and exports, competing-origin supply, and mill demand.

Sources: USDA NASS, Acreage (June 30, 2021); Cotlook, World Long Staple Market 2022; Supima, FAQ and licensing information. USDA ERS, Cotton and Wool Outlook (Oct. 2026). Pima stocks and 2026 spot prices are user-provided estimates/quotes. USDA Oct. 2026 ending-stock headline is all-cotton, not Pima-specific.

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

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



SCAN ME!





GOWAN COTTON
-Hybrid Pima-

Grows like an Upland

Pays like a Pima

EST. 2018

PIMA GROWERS

AMERICA'S FINEST COTTON



MARKET INTELLIGENCE

PRICES
Tracking market movements that impact value.

TRENDS
Identifying patterns shaping today and tomorrow.

INSIGHTS
Delivering knowledge that drives confident decisions.

OPPORTUNITIES
Spotting potential and creating paths for growth.

STEWARDS OF THE LAND.
PRODUCERS OF THE WORLD'S FINEST COTTON.

EST. 2018
PIMA GROWERS
AMERICA'S FINEST COTTON

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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 30, 2026

EXECUTIVE SUMMARY

American Pima spot is $1.5275/lb (USDA 2-2-48); Southeast Asia landed is $1.88/lb. At $0.75/lb, the indicative spread to December Upland futures is 7¢ below its five-year average. PSF is $0.58/lb; WTI is $104.12/bbl.

Week 12 USDA sales (ending Oct. 22): 0.1K RB net sales and 3.3K RB exports. Commitments reached 206.4K RB (+49.0% YoY). Over 12 weeks, net new sales totaled 96.7K RB. Shipments were 39.0% versus 60.4% last year, with 125.8K RB outstanding.

- **Total Commitments** — 206.4K RB | +49.0% YoY
- **Weekly Exports** — 3.3K RB
- **Current Pima/Upland Spread** — $0.75/lb

AMERICAN PIMA VALUE POSITION

+$0.75/LB

PREMIUM OVER UPLAND

Long-Staple Price Ratio: 196%

Five-Year Average Spread: $0.82/lb

MIXED • COMMITMENTS +49.0% YOY

Risks: quiet new sales; shipment pace trails last year



Current spread (navy) • 5-year average (gold)

FIBER MARKET BENCHMARKS | PCIA INDICATIONS

INDICATOR	CURRENT	COMPARISON / SIGNAL
American Pima Landed Southeast Asia	$1.88/lb	Southeast Asia
American Pima Spot	$1.5275/lb	USDA 2-2-48
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	$0.7783/lb	Futures benchmark
Upland — Prior 5-Year Average	$0.83/lb	Reference
Pima/Upland Prior 5-Year Spread	$0.82/lb	Reference
Current Pima/Upland Spread	$0.75/lb	7¢ below 5-year avg.
WTI Crude Oil	$104.12/bbl	Energy cost risk
Polyester Staple Fiber	$0.58/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)	83,000	105,000	

SUPIMA WEEK 12 EXPORT SALES

Total Commitments	206.4K RB	LY 138.5K; +49.0%
Net Sales	0.1K RB	−1.8K WoW; no cancels
Weekly Exports	3.3K RB	−4.2K vs. 7.5K
Shipped to Date	80.5K RB / 39.0%	LY 60.4%
Outstanding Sales	125.8K RB	−3.2K; 4th drawdown, 5wk

COMMITMENTS	ACRES VS 2024	PRODUCTION VS 2024	COMMITMENTS SHIPPED
+49.0% YoY	−31.7%	−18.7%	39.0%
206.4K RB	137K vs 200.5K	383K vs 471K	80.5K of 206.4K

SUPIMA WEEK 12 TRADE DETAIL | USDA EXPORT SALES (WEEK ENDED OCT. 22)

WEEK 12 NEW SALES BY MARKET

Pakistan	0.1
Net sales	0.1
Cancellations	0

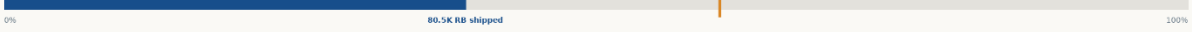
Weekly exports: 3.3K RB • Exports down 4.2K WoW

TOP MARKETS — TOTAL COMMITMENTS (K RB)

India	93.3
Vietnam	42.0
Egypt	11.4
China	10.7
Bangladesh	9.8

SEASON SHIPMENT PROGRESS

39.0% shipped | 60.4% at this point last year



Week 12 sales were nearly flat; the export book remains larger year over year, but shipment pace trails last year.

Sources: USDA AMS Daily Spot Cotton Quotations, Oct. 30, 2026; user-supplied market benchmarks and Pima monitor estimates; USDA FAS Export Sales / Supima Weekly Pima Market Report, Week 12, ending Oct. 22, 2026.

SUPIMA

WEEKLY PIMA MARKET REPORT

USDA Export Sales · Week 12 · Ending October 22, 2026 · MY 2026/27 (Aug–Jul)

A Standstill Sales Week Lets the Scoreboard Rest on 206k

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
0.1 k RB	**3.3** k RB	**206.4** k RB	**39.0** %	**125.8k**
▼ 1.8 quietest week of the MY; no cancels	▼ 4.2 vs 7.5	▲ 49.0% YoY LY 138.5	80.5 of 206.4 · LY 60.4%	▼ 3.2k WoW fourth draw-down in five weeks

THIS WEEK IN THE MARKET

New business went to zero — and nothing came back. Mills signed just 0.1k RB, all Pakistan, in the quietest sales week of the MY — with zero buy-backs for the second time in three weeks. The pause reads as digestion, not retreat: the book held at 206.4k RB after twelve weeks that added 96.7k of net new business, and no position was trimmed anywhere.

Loadings slowed but kept the drain going. Exports of 3.3k RB — India 2.4k — brought accumulated shipments to 80.5k and cut outstanding sales to 125.8k, the fourth draw-down in five weeks. Last year's comp shipped a season-best 10.0k the same week, so the shipped ledger slipped 3.7% behind; 39.0% of the book has moved versus 60.4% a year ago.

The YoY gap is compressing on the comp, not the book. At +49.0%, the commitment lead dipped below 50% for the first time — last year added 6.6k that week as its strongest booking stretch entered the comparison. In absolute terms Supima's book still leads by 67.9k RB, with India at 93.3k (45.2%), Vietnam 42.0k, and the top five unchanged.

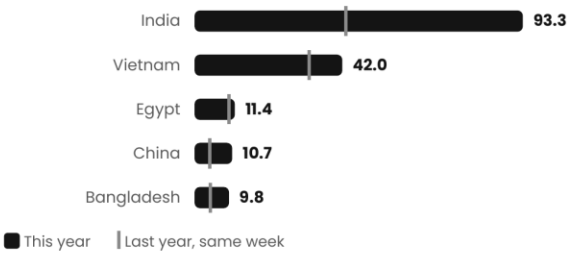
› Twelve weeks in: 96.7k RB of net new business, 80.5k shipped, and a 206.4k book — absolute levels remain the strongest start in years even as the YoY percentage compresses toward last year's late-October surge.

› Pace coverage eased to 1.7× (5.4k/wk 2-week average vs 3.1k/wk required) — the soft end of its range; November loadings need to re-accelerate to keep the cushion comfortable.

› Watch next week: whether the sales pause extends to a third quiet week (only 2.0k signed over two) or the surge-pause rhythm swings back as it did after week 8.

TOP MARKETS — TOTAL COMMITMENTS

k RB, MY to date



WEEK 12 NEW SALES BY MARKET

k RB



SEASON SHIPMENT PROGRESS

% of commitments shipped



With 40 weeks left, clearing 125.8k RB of outstanding sales requires ~3.1k RB/wk against a trailing 2-week pace of 5.4k — 1.7× coverage. The required rate keeps falling as the book clears, so even a slower holiday-season loading rhythm holds the math comfortably; the bigger swing factor is whether new signings resume in November.

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 24, 2026

Nordstrom's Supima-titled program edged past last week's record to $1.91M (+1.3% WoW) — now across 122 styles and 36.2k units as the holiday catalog widens, with kids' Supima beanies and socks launching Oct 19. The long-sleeve crew did $336k, the turtleneck $180k, and the long-sleeve polo $137k. Original Favorites rose to $36.9k (+28.3%) with its 3-pack back in tracked sales. The market index holds at $223M trailing-twelve-month.

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® · 122 SKUS



$1.91M

▲ 1.3% WoW

36,166 units

122 Supima styles tracked — widest ever; LS crew $336k, turtleneck $180k

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 22, 2026); Particl retail intelligence — DTC e-commerce only, excludes wholesale, offline, and several of the largest Supima users (e.g., UNIQLO). DTC windows: Oct 18–24 vs Oct 11–17, 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

29-Oct-26

Volume 109, No. 63

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	78.00	525	Dec-26	83.75
North Delta	-225	Dec-26	76.25	200	Dec-26	80.50
South Delta	-225	Dec-26	76.25	200	Dec-26	80.50
East TX-South TX	-575	Dec-26	72.75	-50	Dec-26	78.00
West TX-KS-OK	-650	Dec-26	72.00	-275	Dec-26	75.75
Desert SW	-775	Dec-26	70.75	-175	Dec-26	76.75
SJ Valley	-750	Dec-26	71.00	490	Dec-26	83.40
Average	-464	Dec-26	73.86	130	Dec-26	79.81
Previous day	-464	Dec-26	73.51	130	Dec-26	79.46

TRANSACTIONS REPORTED

Bales	
Today	Season
0	4,818
0	9,933
0	613
149	60,499
295	14,889
0	546
0	0
Upland Totals	
444	**91,298**

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	78.50	78.15	↑	**0.35**
Mar-27	82.25	81.90	↑	**0.35**
May-27	83.86	83.54	↑	**0.32**
Jul-27	84.33	84.05	↑	**0.28**
Oct-27	78.27	78.00	↑	**0.27**
Dec-27	77.76	77.55	↑	**0.21**
Mar-28	78.41	78.15	↑	**0.26**
May-28	78.70	78.40	↑	**0.30**
Jul-28	78.66	78.24	↑	**0.42**
Oct-28	76.70	76.28	↑	**0.42**

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 10/29/2026
Visalia - Pima

Agricultural Marketing Service
Cotton Market News

October 30, 2026

Volume 10, No. 4

Email us with accessibility issues regarding this report

COLOR GRADE	Week	Season
01	43.7	47.5
02	52.1	49.4
03	3.7	2.9
04	0.4	0.2
05	*	*
06	-	-
07	-	-

EXTRANEOUS MATTER	Week	Season
Prep (01)	-	-
Bark (11)	-	-
Grass (21)	0.1	*
Spindle Twist (51)	-	-
Plastic (71)	*	*

MICRONAIRE	Week	Season
2.4 & Below	-	-
2.5-2.6	-	-
2.7-2.9	*	0.2
3.0-3.2	0.6	1.0
3.3-3.4	0.1	0.8
3.5-3.6	3.9	8.2
3.7-4.2	88.2	86.2
4.3-4.9	7.2	3.7
5.0-5.2	-	-
5.3 & Above	-	-
Avg Micronaire	**3.98**	**3.92**

STAPLE	Week	Season
44 & Shorter	3.9	6.1
46	10.3	12.9
48	52.0	51.2
50	32.1	26.7
52 & Longer	1.8	1.0
Avg Staple	**48.35**	**48.11**
Avg Length	**1.41**	**1.40**

LEAF GRADE	Week	Season
1	47.9	55.6
2	46.0	40.3
3	5.3	3.3
4	0.6	0.7
5	0.1	0.1
6	*	*
7	*	*
Avg Leaf	**1.59**	**1.49**
Avg Trash	**0.26**	**0.24**

STRENGTH	Week	Season
36 & Below	*	2.2
37	2.4	5.8
38	5.1	4.7
39	1.2	2.3
40	1.0	1.0
41	2.5	2.3
42	7.2	6.5
43	14.9	13.9
44	19.7	18.9
45	21.9	20.0
46	15.6	14.3
47	6.0	5.7
48 & Above	2.4	2.4
Avg Strength	**44.33**	**43.84**

UNIFORMITY	Week	Season
83 & Below	0.2	1.0
84	6.7	10.2
85	31.2	28.0
86	43.5	45.5
87	15.9	13.5
88 & Above	2.5	1.8
Avg Uniformity	**86.20**	**86.10**
Bales Classed	**18,040**	**44,693**
Gins	**10**	**10**

Because of rounding, percentages may not total to 100.
* Less than 0.05%

Additional Info:

Source: USDA, AMS, Cotton and Warehouse Program, Market News Division
Memphis, Tennessee | 901-384-3016 |cottonmn@usda.gov
https://www.ams.usda.gov/market-news/cotton
https://mymarketnews.ams.usda.gov

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 30, 2026

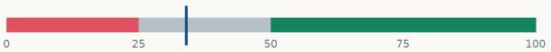
Executive Summary

WTI rose to $104.12/bbl by Oct. 30 while the dollar index edged to 101.88. The 10-year Treasury eased to 4.94%, and Drewry's container index fell 3% to $4,429 per 40-foot container.

December ICE cotton settled at 77.83¢/lb, down 237 points on the week. China PSF was about $0.58/lb using the supplied Oct. 30 quote. The latest China PMI available by the reporting date was September's 50.1, signaling expansion, while cheaper polyester and a softer cotton benchmark remain competitive pressures.

Pima Market Environment Index

34



Negative | Mixed | Positive

NEGATIVE • RELATIVE PRICE PRESSURE REMAINS

Oil and fiber values weigh; freight and yields ease

Editorial qualitative score; not a price forecast

GLOBAL MARKET SNAPSHOT

INDICATOR	OCT. 30 VALUE	WEEKLY DIRECTION	EFFECT ON AMERICAN PIMA
WTI Crude Oil	**$104.12/bbl**	Up 0.8% week	**Energy cost headwind**
U.S. Dollar Index (DXY)	**101.88**	Up 0.07% week	**Currency headwind**
Cotton (ICE Dec. 2026)	**77.83¢/lb**	Down 237 pts week	**Upland benchmark softer**
China PSF Spot	**≈ $0.58/lb**	Below Oct. 23 indication	**Lower-priced substitute**
Ocean Freight (Drewry WCI)	**$4,429 / 40-ft**	Down 3% week	**Freight cost relief**
U.S. 10-Year Treasury	**4.94%**	Down 6 bp week	**Financing relief**
China Manufacturing PMI	**50.1 (Sept.)**	Up from 49.8 (Aug.)	**Expansion signal**

Competitive Position: Price Competition Persists as Freight and Financing Ease

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

WHAT CHANGED THIS WEEK

- WTI closed at $104.12/bbl, up 0.8% from Oct. 23; December ICE cotton fell 2.37¢/lb to 77.83¢.
- Drewry WCI declined 3% to $4,429 per 40-foot container. The 10-year Treasury yield eased 6 basis points to 4.94%.
- China PSF was quoted at ¥9,075/metric ton, or about $0.58/lb at ¥7.10 per U.S. dollar, below the prior $0.62 indication.
- The latest China manufacturing PMI available by Oct. 30 was September's 50.1, up from 49.8 in August and just above the 50 expansion line.

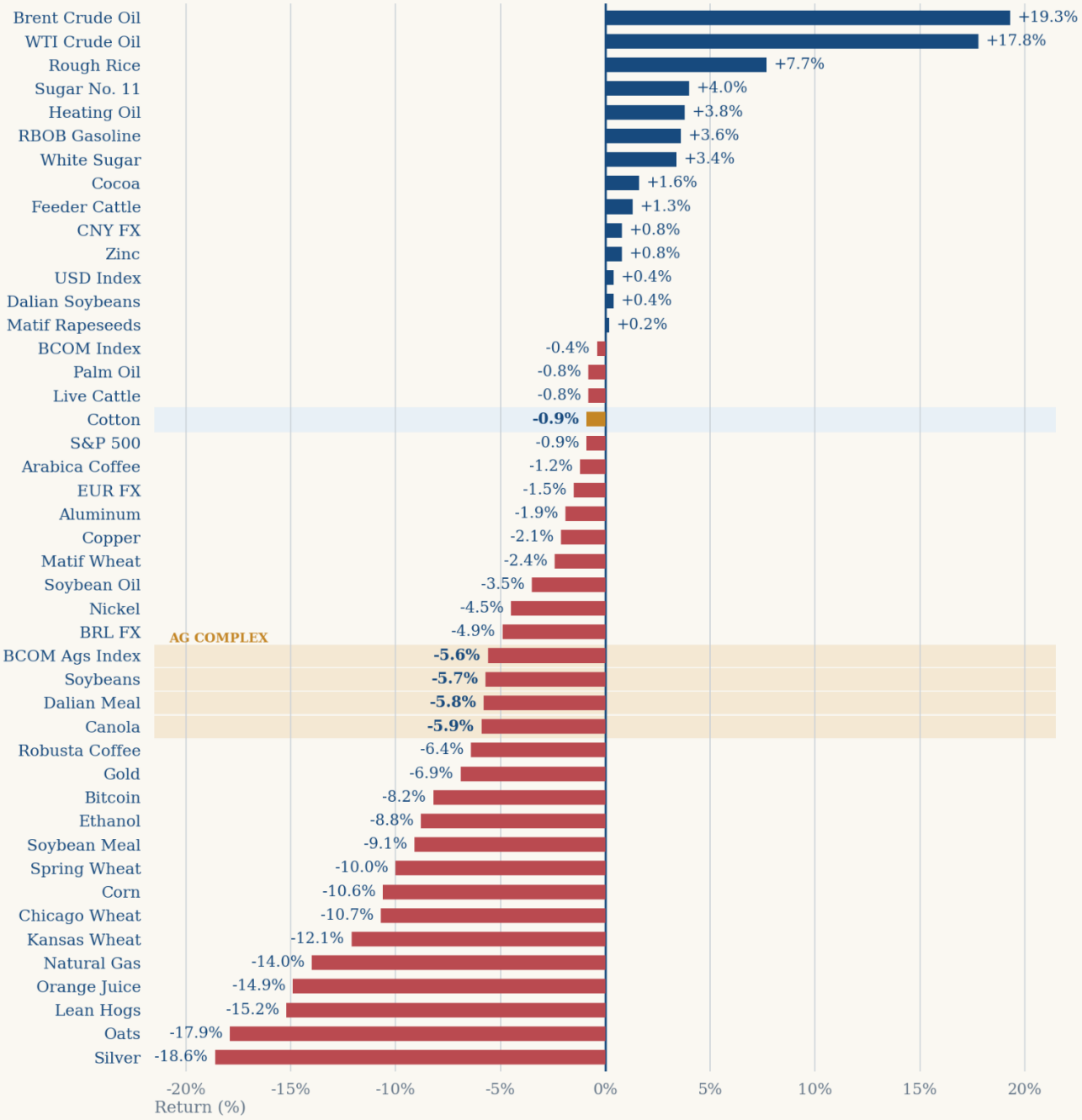
Sources: EnergyNow (WTI); Investing.com (DXY); Texas A&M Cotton Marketing Planner (ICE Dec.); Drewry WCI; U.S. Treasury (10-year); China NBS (latest release available Oct. 30, September PMI); Oct. 30 PSF quote supplied by user, converted at ¥7.10/US$.

GLOBAL COMMODITY PERFORMANCE

OCTOBER 2026 | FRONT-MONTH FUTURES RETURNS

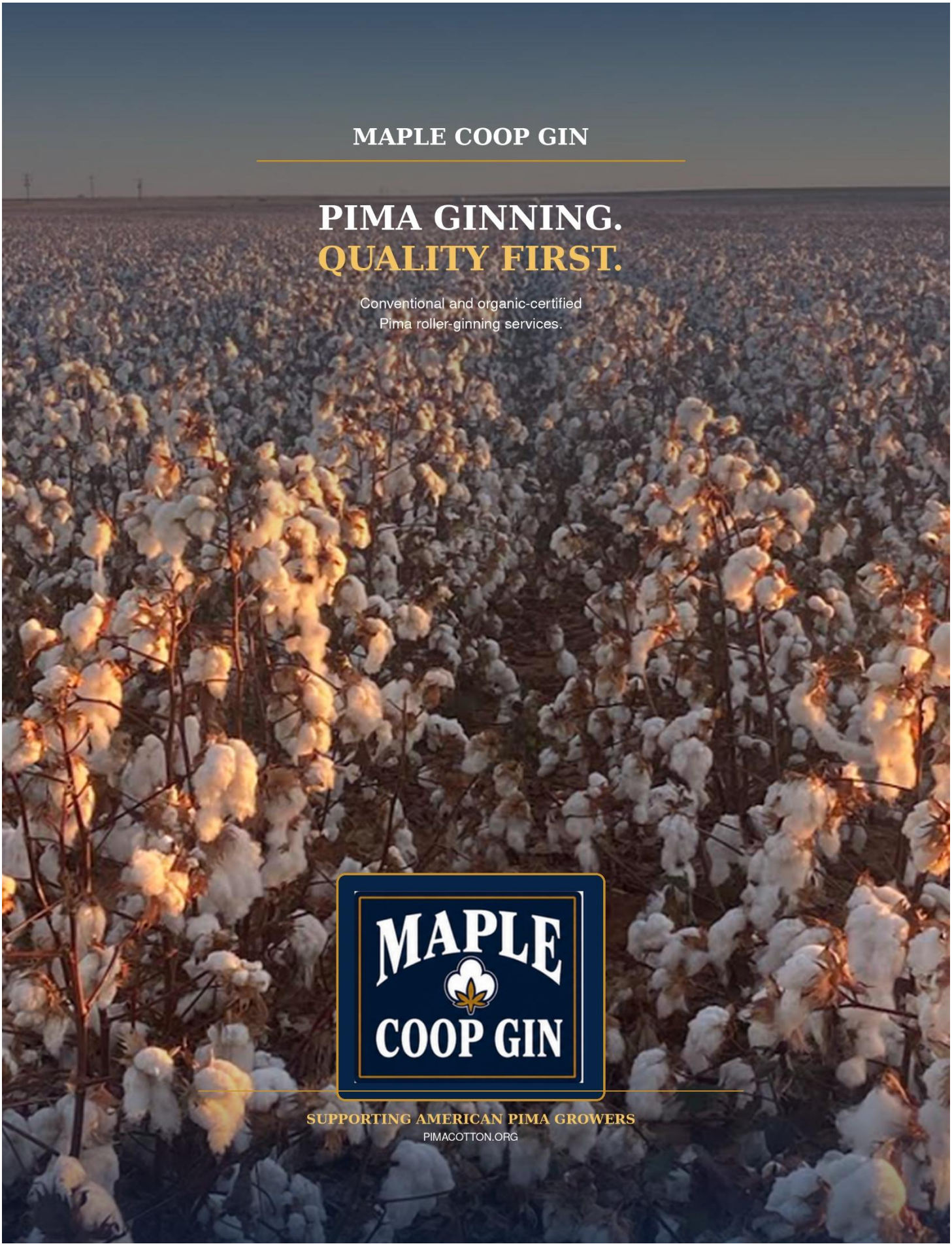
COTTON −0.9%

AG COMPLEX −5.6% TO −5.9%



Source: Trading Economics Research. Futures returns are based on front-month active-contract spot prices; not roll-adjusted.

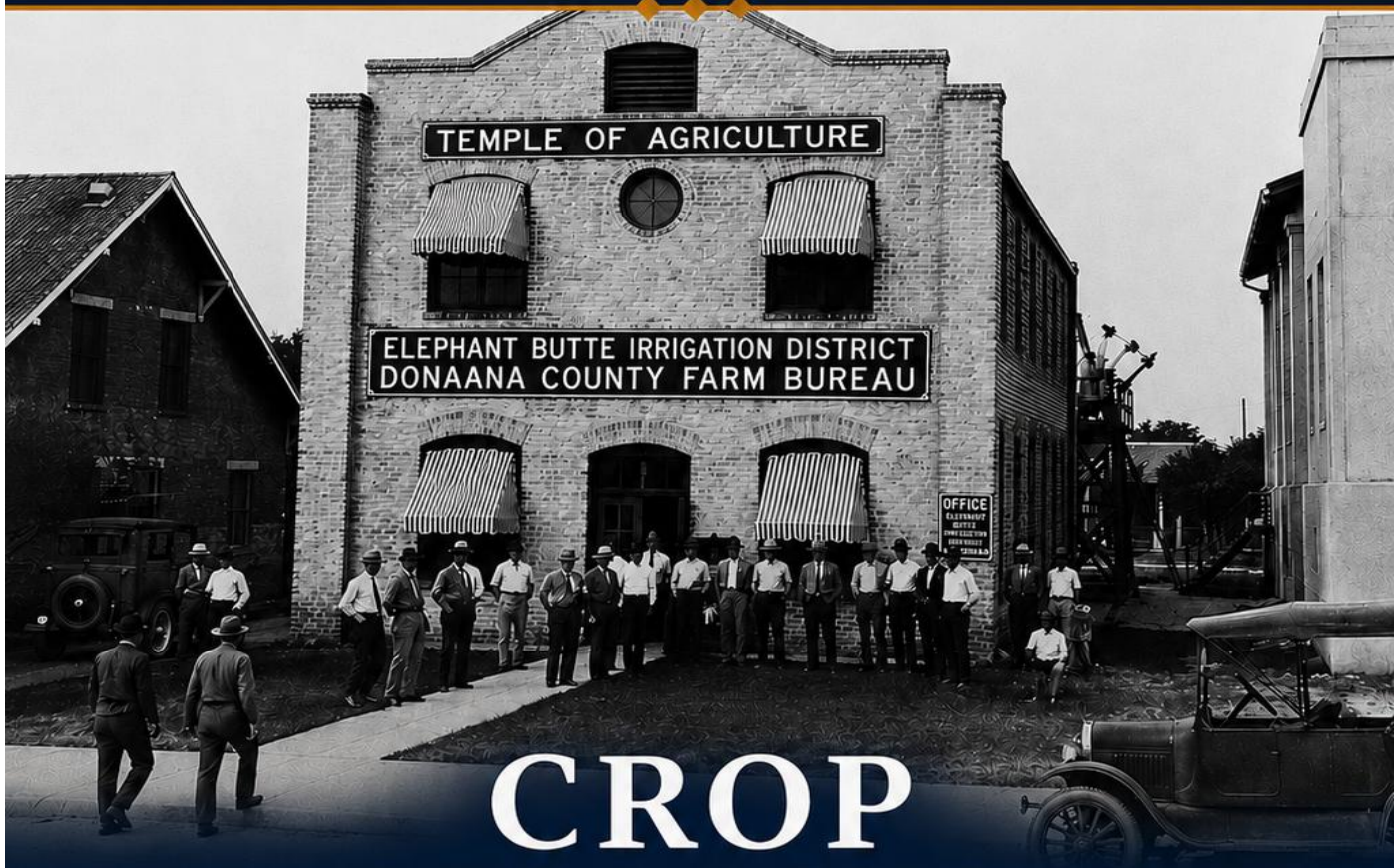

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CROP INTELLIGENCE

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

Timely Insights. Stronger Decisions. Better Outcomes.

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WEEKLY CROP PROGRESS

American Pima Production Update

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

REPORT DATE 10-26-26
USDA DATA THROUGH 10-25-26

Executive Field & National Crop Summary

As of Oct. 25, 89% of the U.S. cotton crop had open bolls, 3 points below the five-year average of 92%. Harvest reached 52%, 7 points ahead of the 45% average. The Southeast was the only region behind its five-year harvest average.

U.S. COTTON HARVEST

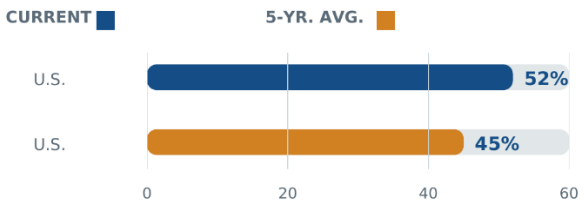
52% HARVESTED

7 points above the 5-year average

USDA COTTON CROP PROGRESS SCORECARD

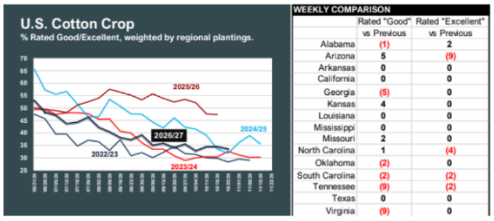
METRIC	CURRENT / BENCHMARK	WEEKLY CHANGE	FIELD CONTEXT
U.S. BOLLS OPEN	89% / 92%	+4 PTS.	3 points below 5-year average
U.S. HARVESTED	52% / 45%	+11 PTS.	7 points above 5-year average
U.S. CROP CONDITION	33.4% G/E	-0.9 PT.	34.3% G/E last week
REGIONAL HARVEST	Southeast: behind	-	No other region behind

U.S. COTTON HARVEST VS. 5-YEAR AVERAGE



The Southeast was the only region behind its five-year harvest pace.

NATIONAL CROP CONDITION



Weekly change in state Good/Excellent ratings.

U.S. BOLLS OPEN

89% vs. 92% 5-year avg.

National pace remains 3 points behind.

U.S. HARVEST

52% vs. 45% 5-year avg.

Harvest is 7 points ahead of average.

CROP CONDITION

33.4% G/E vs. 34.3%

Down 0.9 point from prior week.

PIMA GROWERS INTERPRETATION:

Harvest is running ahead of its five-year pace, while boll opening remains slightly behind. The national good-to-excellent rating slipped again; declines were reported in Arizona, Georgia, North Carolina, Oklahoma, South Carolina, Tennessee and Virginia. The Southeast remains the sole region behind its five-year harvest average.

Source: USDA NASS Crop Progress, week ending Oct. 25, 2026. Condition graphic supplied with this update.

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.

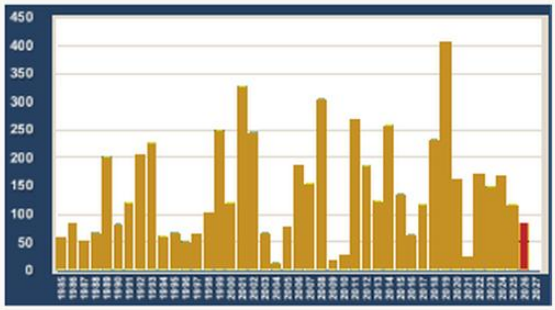
U.S. PIMA COTTON BALANCE SHEET

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 30, 2026

Executive Weather Summary

USDA's Oct. 25 crop report showed 89% of U.S. cotton bolls open, 3 points below the five-year average. Harvest reached 52%, ahead of the 45% average. Good-to-excellent condition slipped to 33.4% from 34.3% the prior week. Rain fell across the southern High Plains Oct. 29–30. The NWS forecasts another wet weekend for Fresno and southern Arizona and New Mexico, with a flood watch for the Safford area through early Monday. Drier weather follows, though strong winds may affect field work Monday.

REGIONAL DEFOLIATION WEATHER RISK

ELEVATED



Primary risk: Weekend rain may restrict harvest access

Monitor: Flood risk; wet fields and Monday winds

Recent rain and additional weekend storms raise field-access concerns. Check local soil conditions before defoliation, equipment entry and harvest.

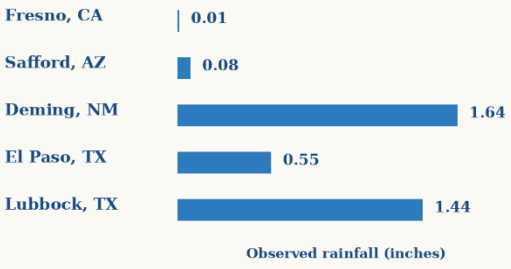
PIMA FIELD STATUS & 7-DAY FORECAST

Location	7-DAY HIGH / LOW °F	LOWEST LOW	OUTLOOK	REGIONAL STATUS
Fresno, CA	67–70 / 49–55	**49°F**	Rain/showers Oct. 31–Nov. 1; dry Nov. 2–6	**Harvest underway; rain may delay access**
Safford, AZ	64–74 / 41–61	**41°F**	Flood watch; heavy showers/storms Sat. night–Mon.	**Wet fields; monitor access and flooding**
Deming, NM	70–77 / 41–55	**41°F**	Showers/storms Sat. and Sun.; windy Mon.; dry after	**Heavy recent rain; field access may be delayed**
El Paso, TX	71–80 / 48–61	**48°F**	Storm chance Sun. night; windy Mon.; dry after	**Recent rain; allow fields to dry**
Lubbock, TX	65–75 / 46–64	**46°F**	Fog/drizzle Oct. 31; breezy Nov. 2–3; mostly dry	**1.44 in. recent rain; allow fields to dry**

Forecast highs/lows show the 7-day range; lowest value is the coldest overnight low. Outlook checked Oct. 31.

7-DAY OBSERVED RAINFALL

Station totals, Oct. 24–30 (inches)



HARVEST & DEFOLIATION STATUS

USDA crop progress (week ending Oct. 25): 89% of bolls open, 3 points below the five-year average; 52% harvested, versus 45% average.

CROP CONDITION

Good-to-excellent ratings fell to 33.4% from 34.3% the prior week. Arizona, Georgia, North Carolina, Oklahoma, South Carolina, Tennessee and Virginia declined.

FIELD PRIORITY

Rainfall ranged from 0.01 inch at Fresno to 1.64 inches at Deming. The NWS forecasts additional rain for Fresno, Arizona and New Mexico through Sunday, with a Safford-area Flood Watch into early Monday. Check soil conditions before field entry; breezy conditions are expected Monday in New Mexico and Texas.

CALIFORNIA

Rain/showers through Nov. 1; drier weather follows.

ARIZONA & NEW MEXICO

Flood watch through early Monday; heavy rain possible.

WEST TEXAS

1.44 in. at Lubbock; allow wet fields to dry.

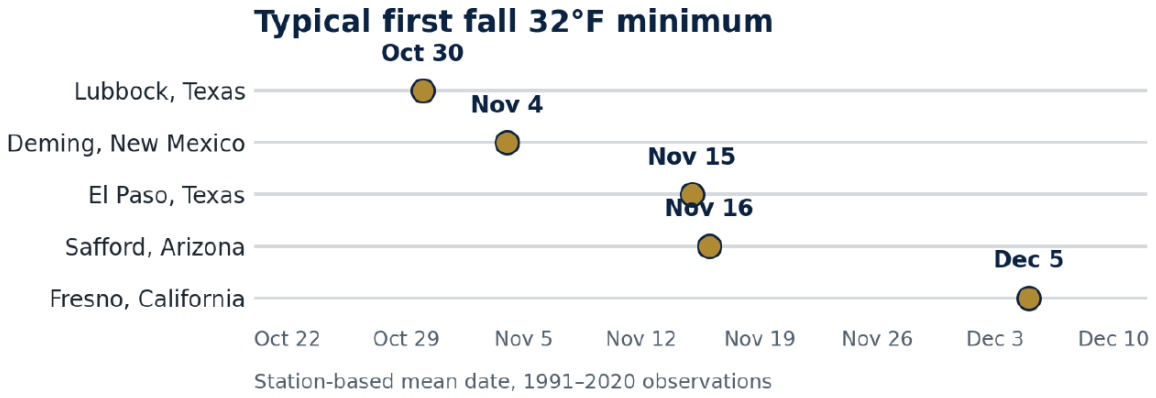
Sources: USDA NASS (Oct. 25); NWS forecasts (Oct. 31); IEM rainfall, Oct. 24–30. Deming NWS airport totals: 0.81 + 0.83 = 1.64 in.; IEM estimated series differs.

PIMA JOURNAL
THE VOICE OF AMERICAN PIMA COTTON
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CROP INTELLIGENCE | FREEZE AND MATURITY

First Freeze Dates and the Cotton Countdown Clock

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



TEMPERATURE GUIDE FOR LATE SEASON PIMA

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

GDD60 QUICK CHECK

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

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

PIMA GROWERS INTERPRETATION

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

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

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

2026 FINAL SEASON SUMMARY

Cumulative GDD60 and Closing Crop Progress Across the American Pima Belt

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

YEAR-END REPORT — OCTOBER 9, 2026

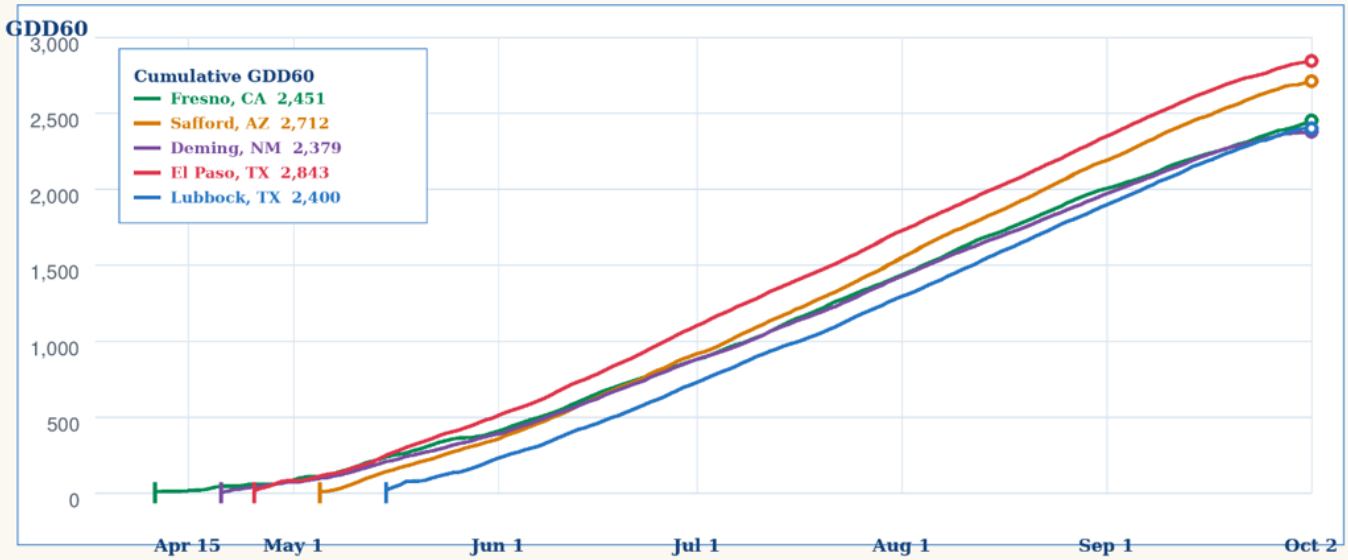
FINAL SEASON SUMMARY

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

CLOSING CROP POSITION

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

CUMULATIVE GDD60 — FINAL SEASON TABULATION



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

GDD60 SCORECARD — FINAL TABULATION THROUGH OCTOBER 2

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

PIMA GROWERS YEAR-END INTERPRETATION:

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

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

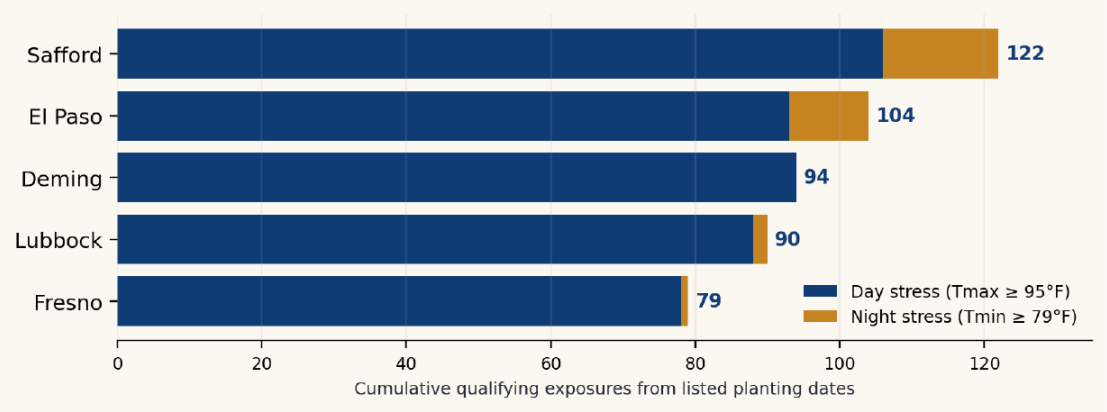
2026 PIMA REGIONAL HEAT EXPOSURE CLOSEOUT

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

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

CLOSEOUT SUMMARY

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



2026 cumulative heat-exposure screening index

CLOSEOUT DECISION AND REGIONAL READ

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

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

A PHYSIOLOGICAL STRESS CLOSEOUT

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

MATCHED SEASONAL TEMPERATURE COMPARISON

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

PIMA GROWERS INTERPRETATION

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

CLOSEOUT LIMITS AND NEXT COMPARISON

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

FINAL RECORD TO COMPLETE

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

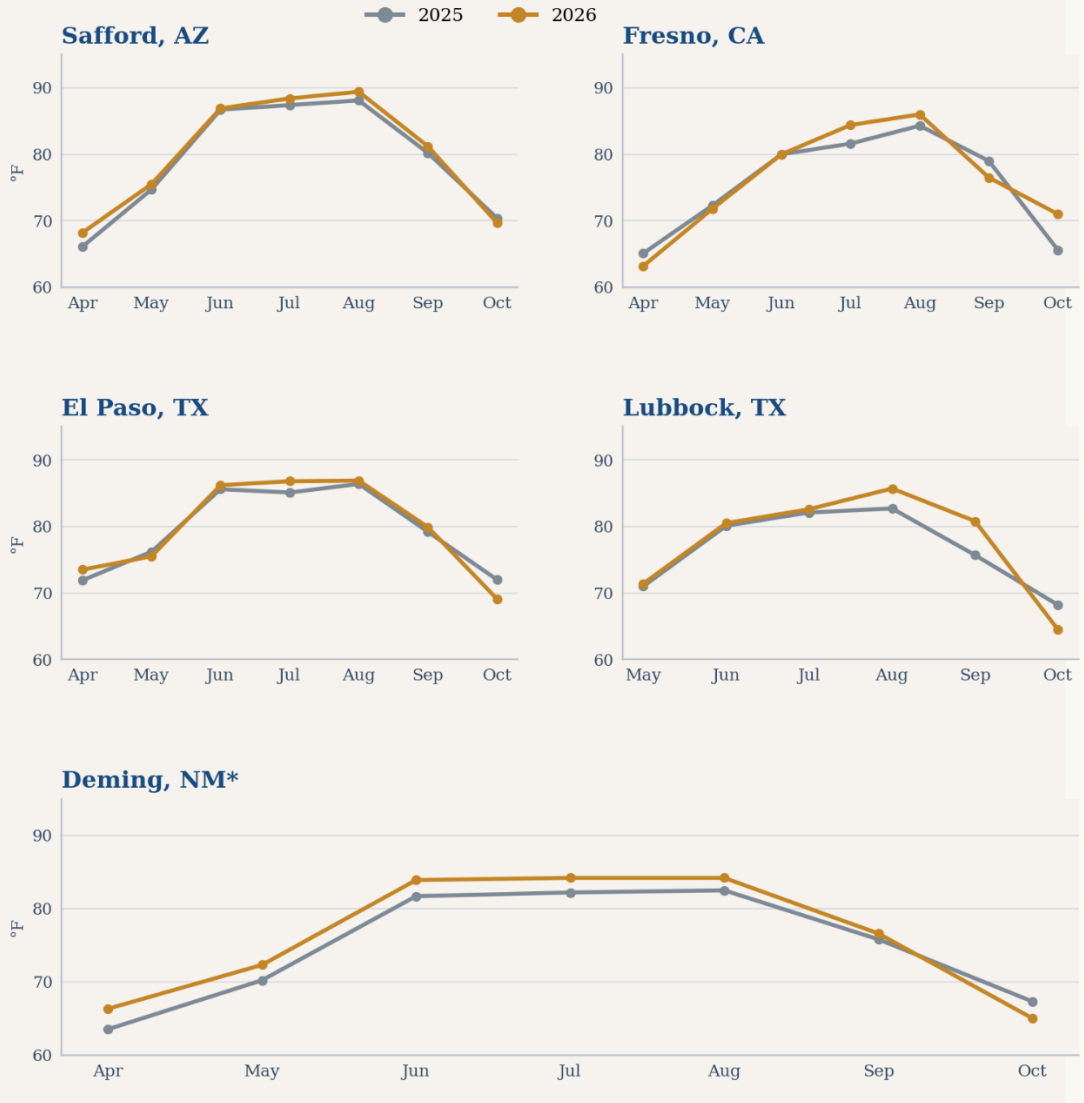
Sources for final issue: Iowa Environmental Mesonet ASOS/AWOS daily summaries; NOAA/NCEI station archive; state agricultural weather networks where station continuity is verified; Pima Growers regional grower and gin observations. Scientific context: Cotton Foundation, Stress Physiology in Cotton; Bayer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

MONTHLY TEMPERATURE PATTERN BY REGION

Five matched station panels compare average daily high/low temperatures across the 2025 and 2026 cotton seasons. This update includes full September and October through Oct. 31.

Monthly Average Daily Temperature: 2025 vs. 2026

Mean of daily maximum and minimum temperature | Updated through October 31



Monthly mean = average of daily maximum and minimum temperatures.

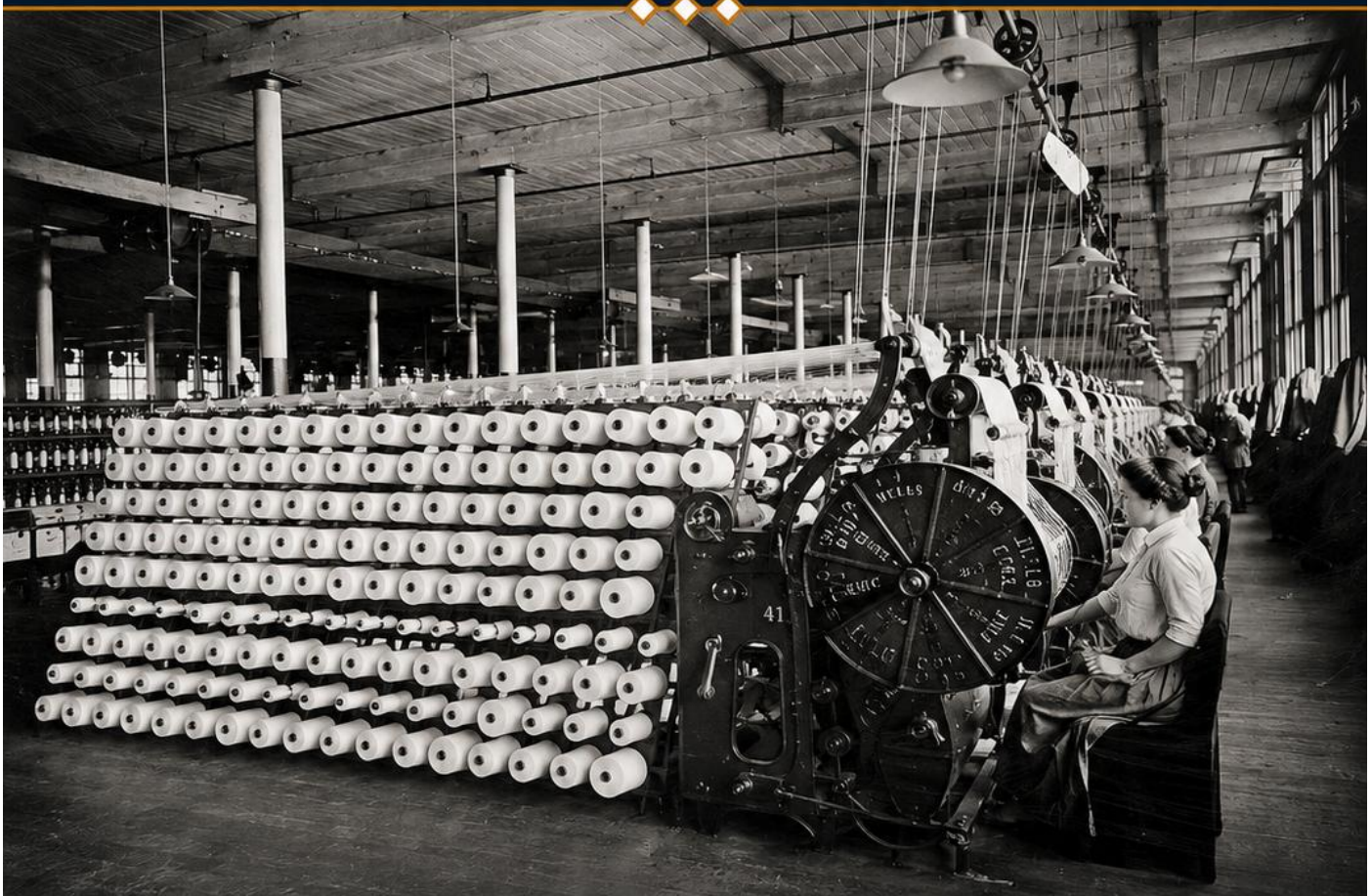
* Deming, NM June 2026: 23 available daily observations. Other plotted months use all available daily summaries in the period.

Source: Iowa Environmental Mesonet (IEM), ASOS/AWOS daily summaries. Partial planting-month windows follow the source comparison.

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FIELD TO FIBER

THE JOURNEY OF PIMA® COTTON

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From Our Fields to the World.

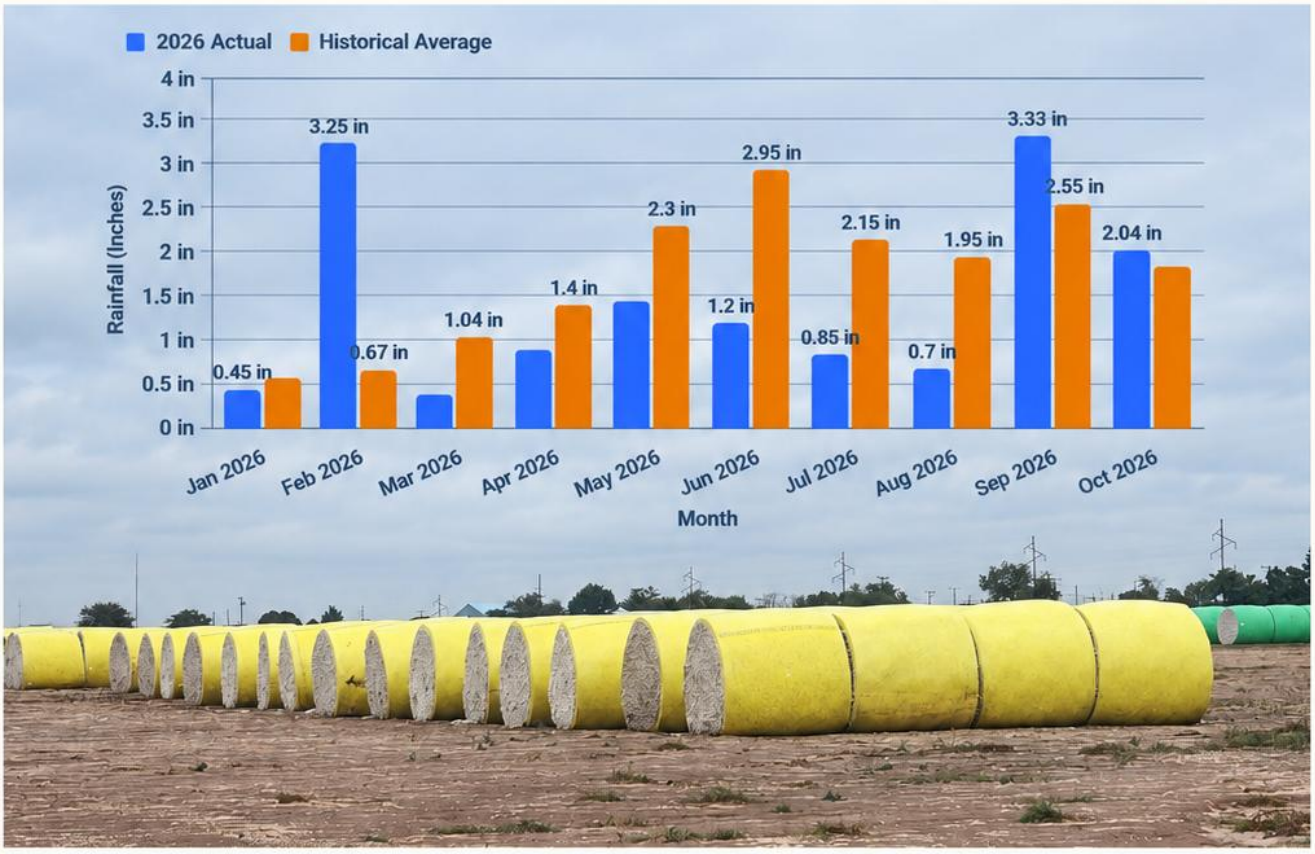
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WEST TEXAS UPDATE

WEEK ENDING 10-30-26



WEST TEXAS FIELD SUMMARY

West Texas: A Year in Contrast

From May through August, rainfall fell well below historical averages. Then September and October brought above-average precipitation.

For area Pima growers, that timing matters. Dry conditions during the growing season can stress crops; late-season rain can complicate field access, defoliation and harvest. A year's rainfall total may look adequate on paper while the timing tells a very different story.

In West Texas, rainfall delivery matters as much as rainfall demand.

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THE PIMA FIELD AND MARKET JOURNAL

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

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TRANSPARENCY & SUPIMA AUTHENTICITY

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.

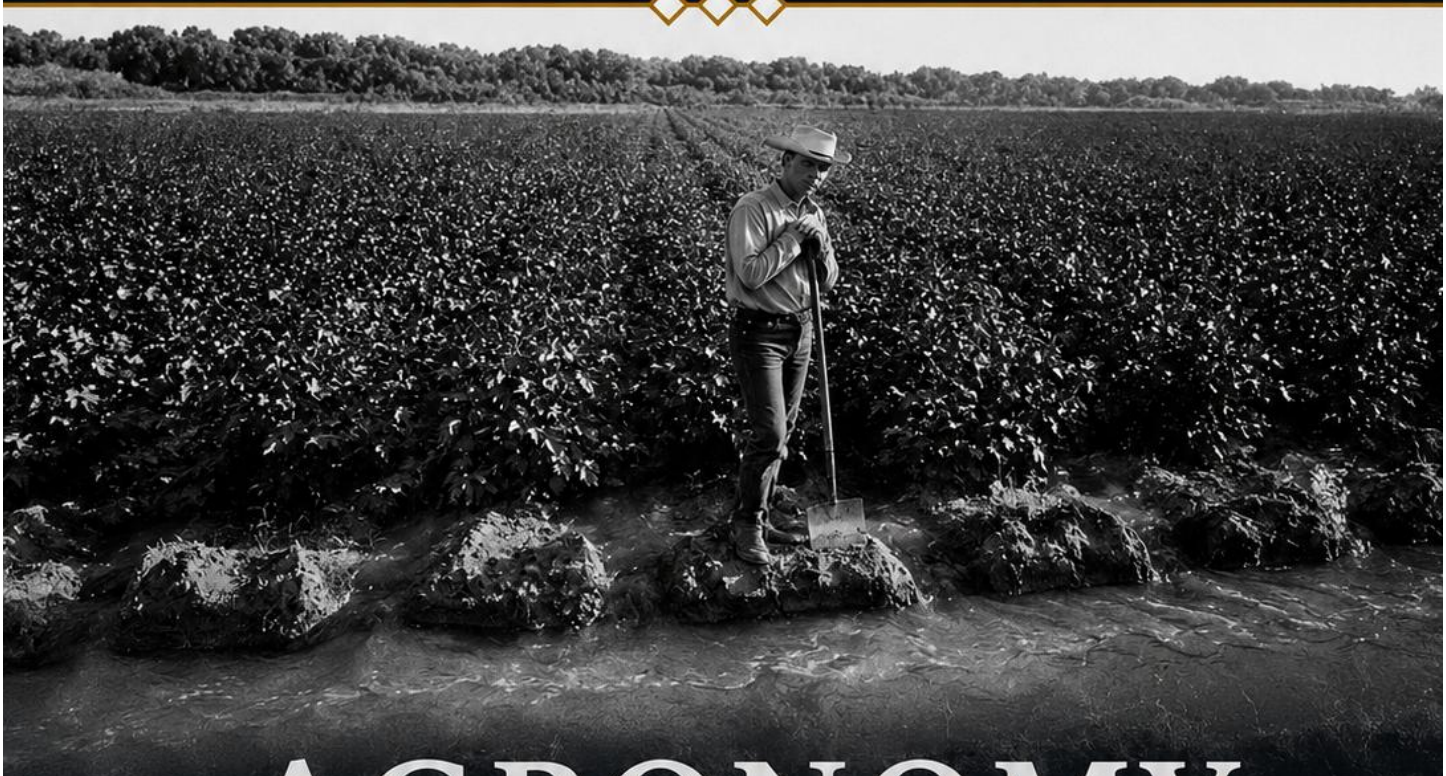
Built on stewardship, science and continuous improvement for people and the planet.

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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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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

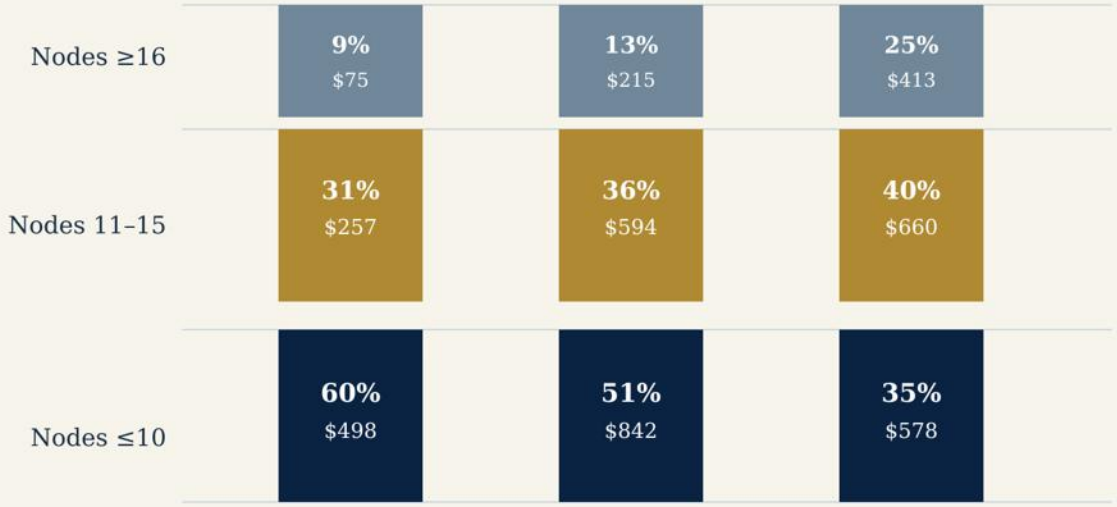
UPLAND COTTON
$0.83/lb = $830 gross fiber value

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.

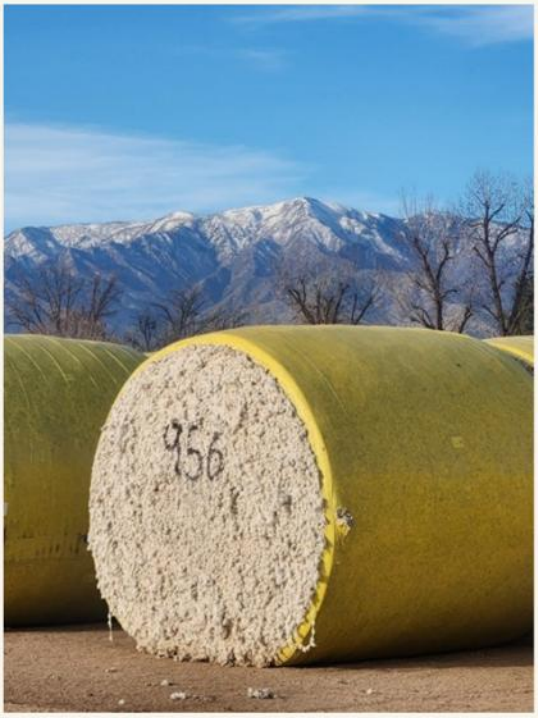
Weather, timing, and storage

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.

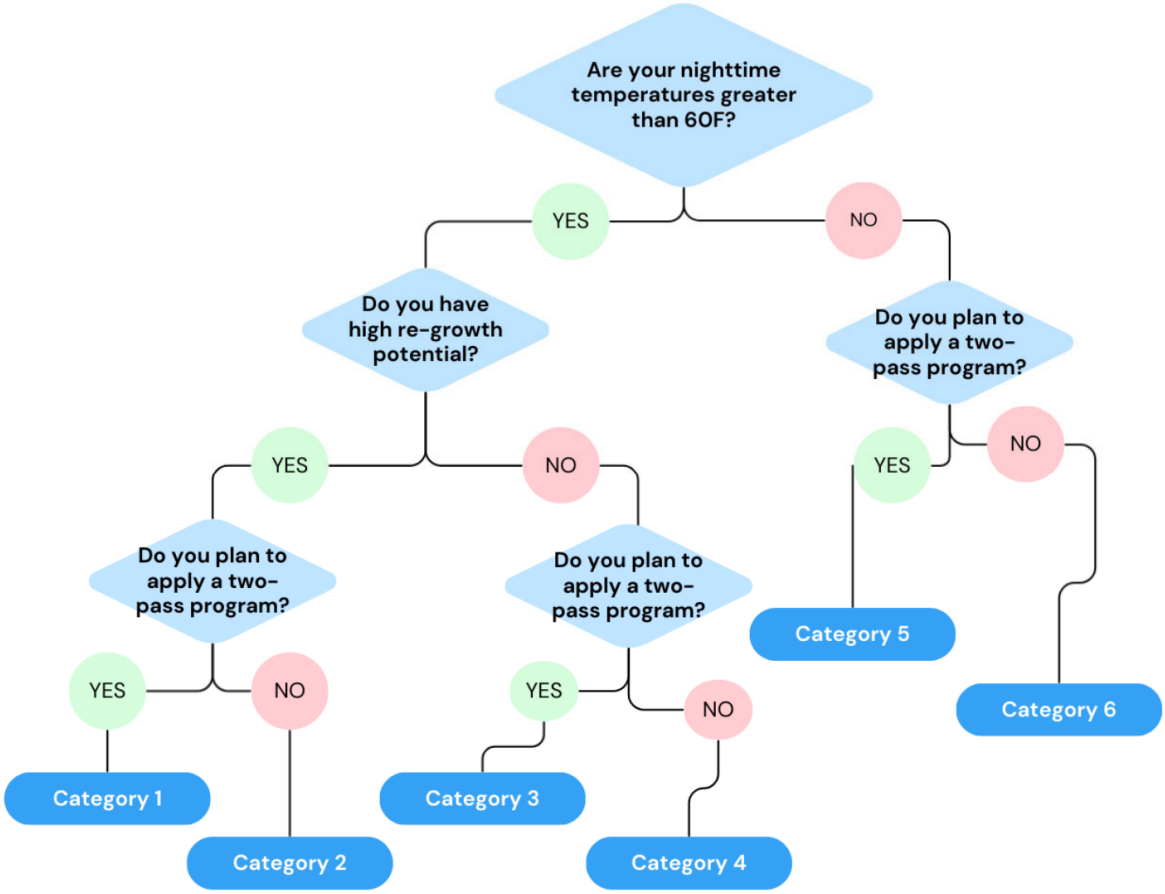
[2] Expected rainfree periods are estimates only and may or may not be exact. Other conditions, including temperature, moisture, and crop status, will play a role in product performance.

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

---

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

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

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

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

---

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

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

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

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

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

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

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

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

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

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

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

Category 5 — Cooler temperatures; two-pass program

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

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

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

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

---

Category 6 — Cooler temperatures; one-pass program

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

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

WEATHER, PLANT CONDITION & HARVEST TIMING

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

The 3-5 day weather window controls response.

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

Weather-Driven Program Choices

STABLE, WARM FORECAST

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

COOL, CLOUDY OR UNSTABLE

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

Rain, Frost and Boll Opening

Avoid applying ahead of substantial rainfall: water entering cracked bolls can increase hard lock and boll rot. Begin the boll-opening process while warm weather remains - typically no later than

Freeze-risk principle

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

Plant Condition Changes the Program

EASIER TO DEFOLIATE

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

HARDER TO DEFOLIATE

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

Timing applications in front of the picker

Do not defoliate every acre at once. Apply 10-14 days ahead of anticipated harvest; leaf drop begins in roughly four days and should be evaluated before the picker enters the field.


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Brett Mathews

Editor @ Apparel Insider | Editorial, Copywriting

CHINESE E-COMMERCE SHIPMENTS TO EUROPE PLUNGE 50% AS EU CUSTOMS CRACKDOWN TAKES EFFECT

New figures from aviation consultancy Aevean show that Chinese low-value e-commerce air shipments to Europe fell a staggering 50% year on year in September.

The figures follow the EU's introduction of a €3 customs duty on low-value imports in July.

For platforms such as **SHEIN** and **Temu**, which have built substantial businesses around shipping inexpensive products directly from China to overseas consumers, the implications could be considerable.

Europe's customs reforms may be fundamentally changing the economics of ultra-fast fashion.

For all the (rather dubious) talk about consumers becoming more conscious of sustainability, price remains one of the most powerful influences on purchasing decisions.

Price is arguably the key driver in the ultra-cheap end of the fashion market.

In terms of what new EU charges mean for shoppers buying from Shein and Temu, a €3 duty on a €5 garment is equivalent to a 60% price increase if passed on in full.

On a €10 purchase, it represents 30%.

These are huge increases for platforms whose appeal is built largely around exceptionally low prices (Question: other than price, do these brands have anything else to fall back on?)



THE PIMA FIELD & MARKET JOURNAL | PIMA GROWERS | WEEK ENDING OCTOBER 30, 2026

PIMA JOURNAL

THE VOICE OF AMERICAN PIMA COTTON

INSIGHT. INTEGRITY. AMERICAN PIMA.

GLOBAL FIBER & FEEDSTOCK | CHINA POLYESTER

China Polyester Margins Squeezed as Feedstock Costs Rise

Higher PTA and MEG costs outpaced weaker filament prices in the final week of October, pushing FDY cash flow below break-even.

China's domestic polyester chain faced a sharp cost-price squeeze in the week ended Oct. 30. Feedstock gains coincided with weaker prices for three filament products; polyester staple fibre (PSF) moved higher.

POLYESTER & FEEDSTOCK PRICES · USD/LB

PRODUCT	OCT. 23	OCT. 30	CHANGE
PTA	$0.4466	$0.4581	**+$0.0115**
MEG	$0.3469	$0.3622	**+$0.0153**
POY	$0.6053	$0.5951	**-$0.0102**
FDY	$0.6120	$0.5954	**-$0.0166**
DTY	$0.6718	$0.6667	**-$0.0051**
PSF	$0.5689	$0.5798	**+$0.0109**

PRODUCT CASH FLOW · USD/LB

PRODUCT	OCT. 23	OCT. 30	CHANGE
POY cash flow	$0.0405	$0.0158	**-$0.0247**
FDY cash flow	$0.0185	-$0.0126	**-$0.0311**
DTY cash flow	-$0.0099	-$0.0048	**+$0.0051**
PSF cash flow	$0.0175	$0.0139	**-$0.0036**

FDY CASH FLOW CROSSED BELOW BREAK-EVEN **$0.0185 → -$0.0126 per lb**

COSTS MOVE AHEAD

PTA rose from $0.4466 to $0.4581 per lb. MEG advanced from $0.3469 to $0.3622. Those gains—about 1.2 and 1.5 cents per pound—came as feedstock costs strengthened on firmer crude and upstream demand, according to the supplied market commentary.

FILAMENTS LOSE GROUND

POY, FDY and DTY prices eased by about 1.0, 1.7 and 0.5 cents per lb. POY cash flow compressed from $0.0405 to $0.0158. FDY crossed below break-even, falling from $0.0185 to -$0.0126 per lb.

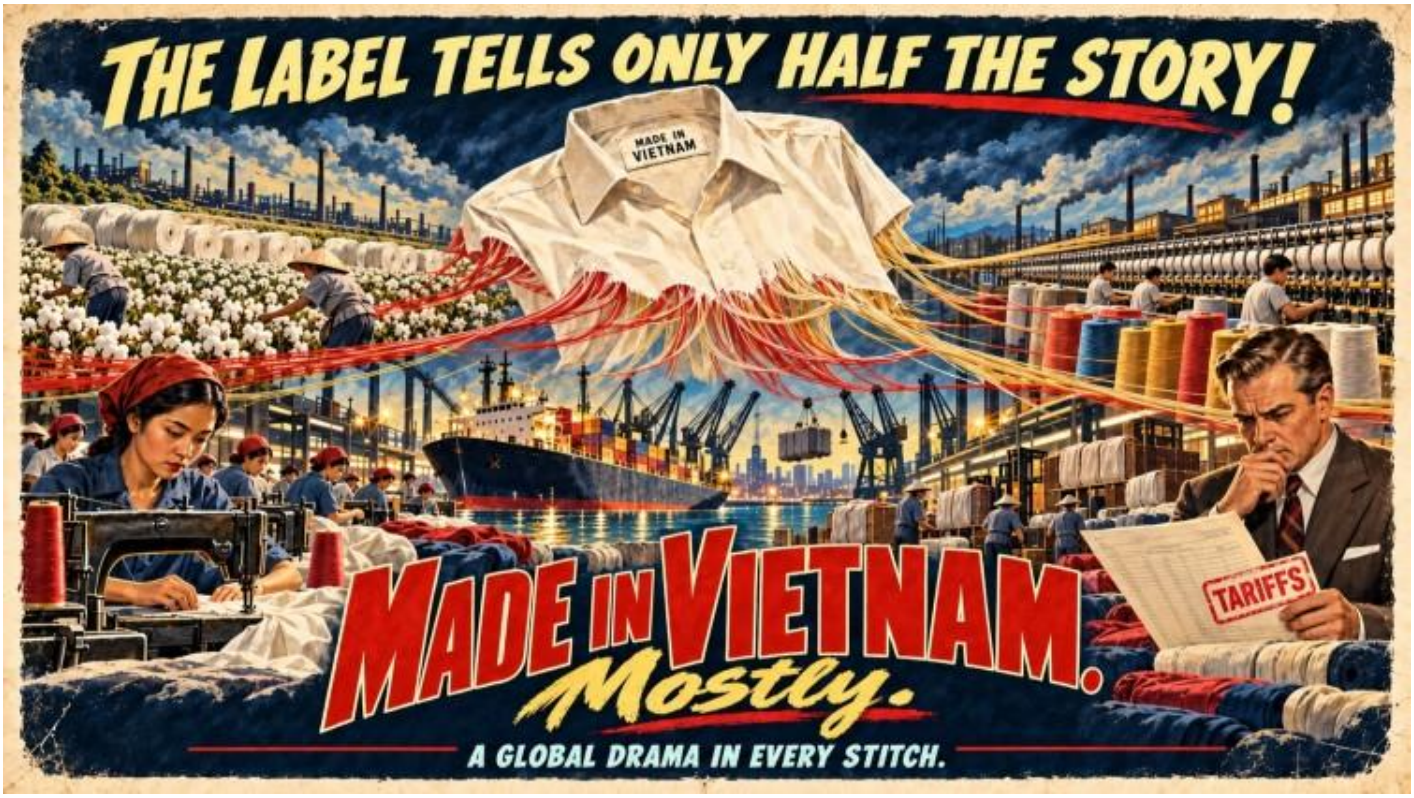
PSF HOLDS BETTER

PSF price climbed from $0.5689 to $0.5798 per lb. Its cash flow narrowed from $0.0175 to $0.0139. DTY losses eased from -$0.0099 to -$0.0048 per lb, but remained negative.

MARGIN READ-THROUGH

Input costs rose as selling prices slipped across three of four polyester products. FDY showed the sharpest deterioration. The supplied commentary attributes relative PSF support to nonwoven and staple applications, though PSF cash flow also declined.

Conversion: RMB per metric tonne ÷ (¥7.10 per US$1 × 2,204.62 lb per metric tonne). USD values rounded to four decimals; ¥7.10 is a rounded working exchange rate, not a verified daily fixing. Source data: Nabarun KAR; week ended Oct. 23 and Oct. 30, 2026.



Robert Antoshak

Tariffs pushed Chinese textile companies to build mills in Vietnam and, closer to home, in Mexico, so plenty of what we import from those places still runs on Chinese yarn and fabric. Customs is supposed to keep Xinjiang cotton out, and it doesn't have the people to do it. Mexico loses to Asia on a cost sheet and wins on speed, assuming a buyer bothers to put a price on six weeks versus six months. Most don't. Clothing prices sat flat for years while the supply chain ate the tariffs. This year they caught up with everything else.

And the comeback everybody wants? I see one, in pockets, with robots and a few engineers running plants that used to employ thousands. Getting there takes capital the old industry never had.



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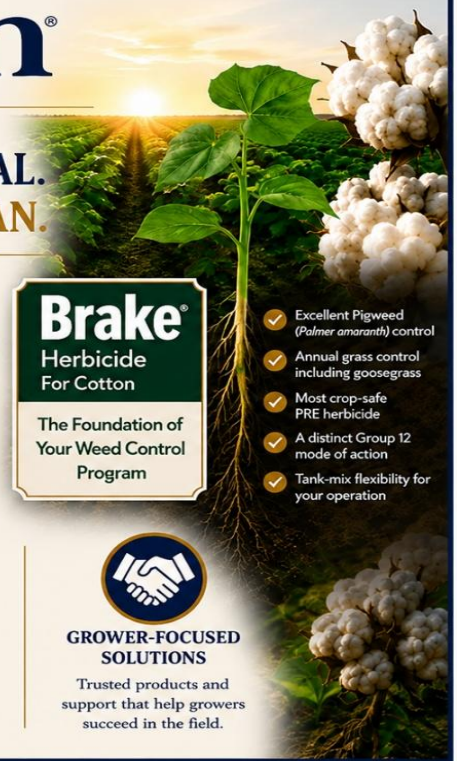
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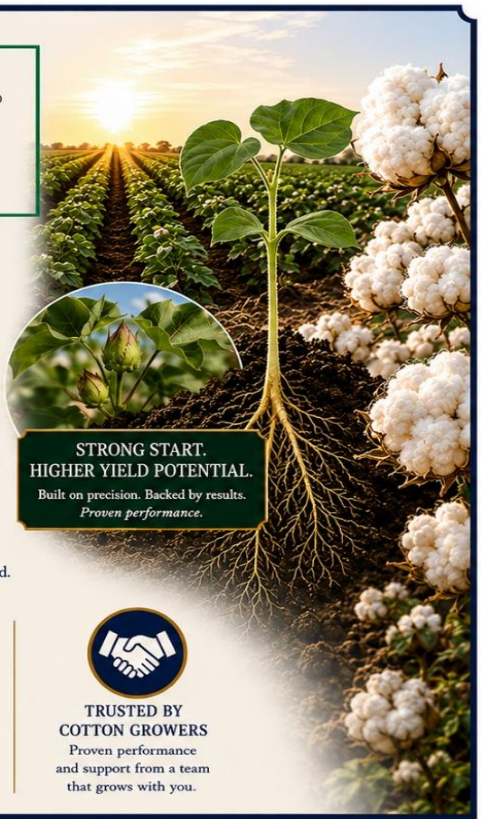
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- PREMIUM FIBER QUALITY & GENTLE HANDLING
- STATE-OF-THE-ART EQUIPMENT
- INTEGRITY, SERVICE & COMMUNITY FOCUSED

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- Connections with industry leaders and collaborators
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