

**cosmetic
wipes**
REPORT



developing better beauty

Cosmetic wipes are an integral part of skincare routines, offering a convenient way to cleanse and refresh skin. However, modern consumers are demanding more than just beauty care – **the products they trust against sensitive skin can't simply remove makeup, they must strike a balance of efficiency and gentleness, soothing and sustainability.** Customers are prioritizing products that address key concerns like gentleness and skin safety¹. And as a naturally soft, clean, and hypoallergenic² fiber grown from the earth, cotton is a premier ingredient for cosmetic wipe performance and appeal.

The Cotton Incorporated 2024 100% Cotton Nonwoven Cosmetic Wipe Trials include a pilot portfolio of carded webs of bleached and virgin cotton fiber spunlaced into nonwoven substrates for beauty wipes. Over the course of a year, a quest for proven performance was actualized in two nonwoven grades designed specifically to meet the needs of facial cleansing.

PROJECT ID	PATTERN	SUB-CLASS	PILOT LINE	GSM	FIBER CONTENT
NW-1052	 small square	Cosmetic Wipe	ANDRITZ Perfojet SAS	65	50% TruCotton™ 50% HighDri®
NW-1053	 small square	Cosmetic Wipe	ANDRITZ Perfojet SAS	65	70% TruCotton™ 30% HighQ®



The **HyDri®** and **HighQ®** bleached, purified cotton for the pilot came from Barnhardt Manufacturing Company. The **TruCotton™** virgin cotton came from Wildwood Technologies. The nonwovens were produced at Andritz Perfojet SAS in Montbonnot, France on their pilot line, and the NW-1053 cosmetic wipe was converted at Pacon Manufacturing in Leland, NC. Use of these collaborators is for illustrative purposes only and does not imply endorsement.

GSM listed is a nominal target. Actual GSM data is within tolerance of specification and may vary.

HighQ® and HyDri® are trademarks of Barnhardt Manufacturing Company. TruCotton® is a trademark of Wildwood Technologies.

three fibers used and their details

The trials used 100% cotton fibers, gentle on sensitive skin and proven to perform.



Barnhardt Purified Cotton



Wildwood Technologies



Barnhardt Purified Cotton

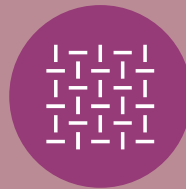


pilot supply chain



FIBER

All cotton used in the trials is U.S. grown. The cotton is available in either standard or organic form. All bleached cotton came from Barnhardt, and virgin, mechanically cleaned came from Wildwood.



MANUFACTURER

The pilot was developed on Andritz equipment. Examples of North American providers that can supply 100% cotton spunlace include Fibertex, Sandler, and Norafin.



CONVERTERS

Cotton collaborated with converter Pacon for this particular pilot work. Converter examples include Rockline, Premier Care, Guy & O'Neil, Nice-Pak, and Kleen-Test. All are capable of converting cosmetic wipes.



Fiber producers and manufacturers are listed for illustrative purposes only and does not imply endorsement. **Scan the QR code or visit CottonWorks.com/Sourcing** to explore Cotton Incorporated's complimentary sourcing directories and build your cosmetic wipe supply chain.

PROJECT NW-1052 | oil-based cosmetic wipe

50% TruCotton™ TC-1S, Virgin / 50% HighDri® Bleached

This use of 50% TruCotton™ and 50% HighDri® cotton has been specifically formulated to both hold and deliver oil-based make-up removal formulations. It maintains the product strength, liquid holding and delivery, cleaning efficacy, and softness for skin contact. However, in this case for use with oil-based makeup remover formulations with HyDri® that has a higher oil absorbency. While HyDri® is hydrophobic and nonabsorbent with water-based lotions; HyDri® is oleophilic, and therefore absorbs and holds oil-based lotions at a much higher rate than HighQ®.

PROJECT NW-1053 | general purpose cosmetic wipe

70% TruCotton™ TC-1S, Virgin / 30% HighQ® Bleached

This use of 70% TruCotton™ and 30% HighQ® cotton allows for the optimum balance of processing capabilities, product strength, liquid holding and delivery, cleaning efficacy, and softness for skin contact for general purpose cosmetic wipe lotion formulations. Additionally, the product has been designed with a custom emboss pattern which allows for excellent cleaning characteristics without being scratchy or uncomfortable.



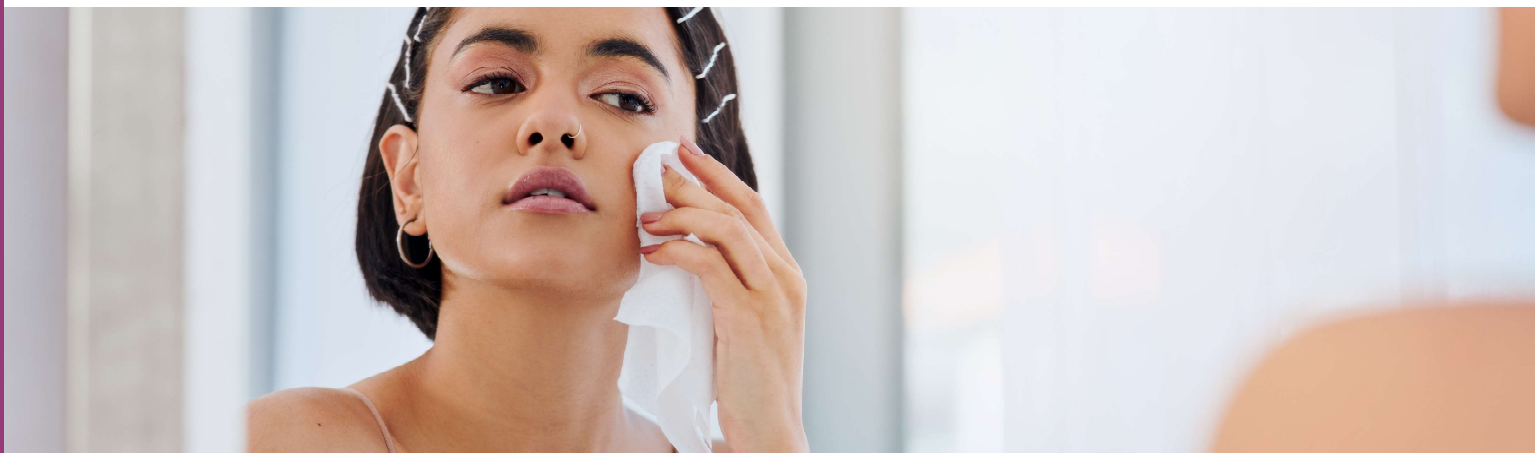
Explore these 100% cotton nonwoven substrates at CottonWorks.com/Samples and request samples by e-mailing Nonwovens@CottonInc.com.

benchmark data³

The leading products¹ industry average was derived from the following facial wipe brands: **Almay, Aveeno, Garnier, L'Oreal, Neutrogena, Olay, Ponds, and Simple.**

COSMETIC WIPE IDENTIFICATION	BASIS WEIGHT (gsm)	THICKNESS (mm)
NW-1053 Cotton Incorporated Trial	63	0.46
Leading Products Industry Average	63	0.39

The device used was an Ames Thickness Tester with a 8.6 ounce weight and a 1 inch presser foot; a common thickness configuration.



design trends



CLEAN & LOW IMPACT⁴

Products that are easy on the planet from conception are highly desirable. Brands that pair down on finishes and prioritize only essential elements maximize appeal with the millennial minimalist. Natural ingredients win in this space.



PETIT GLAM⁵

Travel-sized and miniature makeup products are redefining convenience and accessibility, offering high-quality beauty essentials in compact, on-the-go formats.



ECO LUXE⁶

Where sustainable opulence meets high-quality beauty, ethical sourcing and eccentric brands are delivering indulgent self-care without compromising on responsibility.

packaging trends⁴



SUSTAINABLE MATERIALS

Remind customers of your commitment to sustainability with minimal packaging



BARE ESSENTIALS

Embrace tranquility and self-care with light, airy colors, clean lines, and bared-back packaging



ARTISAN QUIRK

Celebrate a return to eclectic crafts and elevated DIY with playful designs consumers can connect with



EVERYDAY INDULGENCE

Create a luxe, high-quality feel with lavish packaging like metallic finishes and bold color combos



A.I. INFLUENCE

Stimulate the senses with digital-inspired puffy fonts and hyper-saturated colors

color trends

Cotton Incorporated's fashion marketing team acts as your color compass in the ever-changing trend landscape, guiding with precise forecasts and insightful strategies. For Cotton's cosmetic wipe launch featuring three packaging concepts, the color palette was inspired by the Color & Surface FW25/26 Dichotomy Trend illustrated below. To access the original forecasting, visit: CottonWorks.com/trend-forecast



Colors shown are digital representations for users; actual colors can be obtained at PANTONE.com



Total U.S. market size in 2023¹

\$664.1 MILLION

Top U.S. brand in 2023¹

Neutrogena

\$258.4 MILLION

Total U.S. market concentration
of the top 5 brands in 2023¹

65%

Johnson & Johnson, Unilever Home &
Personal Care USA, Revlon Products Corp,
Procter & Gamble Co, L'Oreal USA Inc

Top Nine Cosmetic Wipe Manufacturers & Brands Based on Market Size & Share (2023)

MANUFACTURER	BRAND NAME	MARKET SIZE (USD MILLION)	BRAND SHARE (%)
Johnson & Johnson	Neutrogena	258.4	38.9
Unilever Home & Personal Care USA	Simple	68.9	10.4
Unilever Home & Personal Care USA	Pond's	42.3	6.4
Revlon	Almay	34.3	5.2
Procter & Gamble Co	Olay	31.5	4.7
L'Oreal USA Inc	Garnier Nutritioniste	22	3.3
Johnson & Johnson	Clean & Clear	10.8	1.6
Johnson & Johnson	Aveeno	8.7	1.3
Mary Kay Inc	Mary Kay	6.6	1.0

differentiating in the cosmetic wipes market: a shift toward sustainability

As sustainability is expected to yield greater influence on future sales and competition¹, brands are seeking ways to demonstrate their commitment to sustainable alternatives.

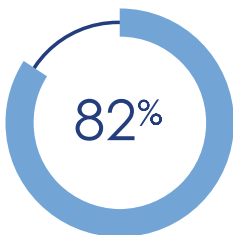


beauty brand case study: *Varuza Cosmetics*

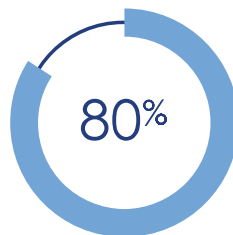
Varuza cosmetics is a sustainable skincare brand “committed to delivering customer-centric skincare solutions through sustainable practices”.⁷

Their natural packaging prominently features Cotton Incorporated’s Seal of Cotton trademark, further differentiating their product as a sustainable choice.

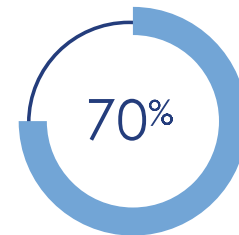
The cotton brand listed is for illustrative purposes only and does not imply endorsement. Visit [CottonWorks.com/Sourcing](https://www.cottonworks.com/sourcing) to explore more cotton brands.



of consumers equate the Seal of Cotton trademark with **sustainable products**⁸



of consumers say a brand using this logo **cares about the environment**⁸



of consumers would **pay more for a natural fiber** such as cotton⁹

better for your skin, better for our planet

Cotton Incorporated's 2024 100% Cotton Nonwoven Cosmetic Wipe Trials achieves an illustrative line of retail-ready cosmetic wipes. Our concepts – uniquely soft, naturally clean, and refreshingly gentle – highlight the inherent cotton qualities that make the fiber stand out against synthetics.

Explore these 100% nonwoven substrates at CottonWorks.com/Samples and request samples by e-mailing Nonwovens@CottonInc.com.



These wipes are purely illustrative, not for resale, and aim to demonstrate the feasibility, features & benefits of cotton.

go to market with cotton



Retailers can work with Cotton to find cotton-capable suppliers that

can produce the trial work at scale for their private label assortment for teams interested in including a premium cotton wipe grade in their assortments. Through



our sourcing directories and cotton support, brands can leverage cotton as an ingredient and the Seal of Cotton trademark to amplify their market presence with a fiber consumers trust.



the power of the Seal is real

After 50 years of marketing support from Cotton Incorporated, the Seal of Cotton trademark is widely recognized and trusted by consumers – and the beauty industry is no exception. Learn more about our royalty-free trademark licensing program to leverage the iconic Seal of Cotton trademark for your brand.





what will you create?

To feature the Seal of Cotton trademark on your products, contact your Cotton Incorporated account representative.

Find out more at CottonWorks.com/CosmeticWipes,
Or reach out at Nonwovens@CottonInc.com

Cary

New York

Hong Kong

Shanghai

Mexico City



Cotton
Incorporated

AMERICA'S COTTON PRODUCERS AND IMPORTERS Service Marks/Trademarks of Cotton Incorporated. ©2024 Cotton Incorporated Cosmetic Wipes Report. All rights reserved.

1 Euromonitor International 2024 Cotton Incorporated Market & Insights Dashboard

2 Cotton Incorporated 2019 Clinical Trials

3 Cotton Incorporated 2024 100% Cotton Nonwoven Cosmetic Wipe Trial

4 FASHION SNOOPS, Future of Sustainable Materials Report (<https://www.fashionsnoops.com/>)

5 Mintel 2024 Makeup Minis (<https://www.linkedin.com/company/mintel/posts/>?)

6 MINTOIRO 2023 Top 10 Eco Luxe Beauty Brands to Watch (<https://www.mintoiro.com/post/top-10-eco-luxe-beauty-brands-to-watch>)

7 VARUZA website (<https://www.thevaruza.com/>)

8 Cotton Incorporated's 2020 Seal of Cotton Consumer Research

9 Cotton Incorporated 2019-2021 Lifestyle Monitor™ consumer surveys