Scalp CARE



October 2026 / Scalp Care report

THE BEAUTY INSIGHTER

When skincare logic moves to the scalp:

“Bridging the science–wellness gap in haircare.”



Index

1. Market context

1.1 Market data

1.2 Consumer insights

2. Brand archetypes

2.1 The scientific expert

2.2 The botanical naturalist

2.3 The luxury ritualist

2.4 The personalised coach

3. Emerging trends

3.1 Skinification

3.2 Sensoriality

3.3 Digitalisation

4. Packaging innovations

4.1 Precision-driven formats

4.2 Sensorial design

4.3 Sustainable systems

5. Promotion

5.1 Content & education

5.2 Channel strategy

5.3 Loyalty & monetisation

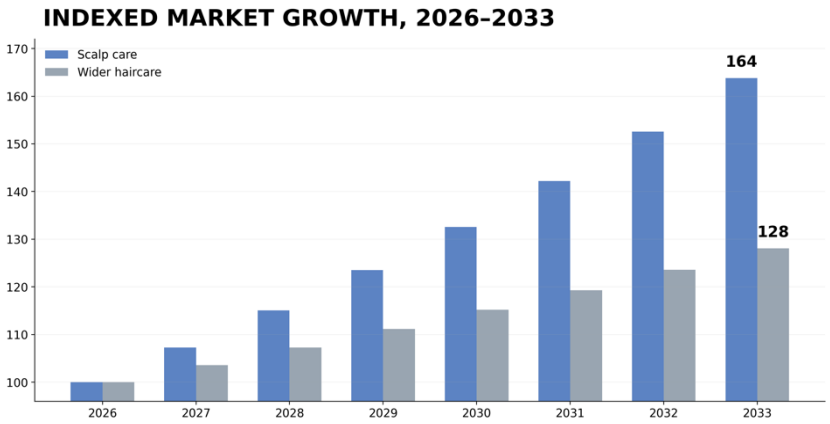


1. Market context

Scalp care is strengthening its position within haircare, with treatments and scalp-focused products among the category's strongest growth areas.

1.1 Market data

1.2 Consumer insights



$15.8B in 2026 → $25.9B by 2033 (+7.3% CAGR)

Scalp care is forecast to grow at around 2× the rate of the wider haircare products market: +7.3% vs +3.6% CAGR through 2033.

1.1 Market data

Scalp care continues to outpace the wider haircare market.

REGIONAL DYNAMICS

Asia-Pacific — Scale & growth leader

The largest hair & scalp care region, with specialised treatments and serums gaining ground.

North America — Premium treatment momentum

Prestige growth is increasingly treatment-led, with scalp care remaining a standout category.

Europe — Premium & dermocosmetic relevance

High awareness of hair health supports premium, specialised and dermatologically positioned scalp care.

1.2 Consumer insights

Scalp care is addressing multiple overlapping needs, from comfort and balance to thinning and hair loss.

45% of U.S. female beauty buyers experienced scalp itchiness in the past six months, while 41% reported dryness and 41% thinning or hair loss.

Consumer interest is shifting toward more specialised treatment formats.

78% are interested in BHA/AHA scalp products, 77% in detox treatments or tonics, and 75% in hydrating scalp serums or lotions.

Advanced skincare concepts are increasingly relevant to how consumers understand scalp health.

75% show interest in microbiome-supporting scalp care, 73% in longevity and 67% in barrier-repair treatments.





2. Brand archetypes

As scalp care becomes more premium and emotionally driven, brands are building distinct territories beyond efficacy alone.

These four archetypes show how scalp health is translated into different brand promises: clinical trust, natural integrity, sensorial aspiration and personalized wellness.

2.1 The scientific expert

2.2 The botanical naturalist

2.3 The luxury ritualist

2.4 The personalised coach

2.1 The scientific expert

Science becomes the brand language, turning scalp care into a credible, targeted treatment category.

- Clinical credibility is built through instrumental testing, measurable results and transparent study claims.
- Skincare-derived actives and scalp-barrier or microbiome language position formulas as targeted treatments rather than conventional haircare.
- Precision applicators and controlled dosing reinforce treatment logic and perceived efficacy.
- Clean layouts, restrained visual codes and structured information keep the focus on function, expertise and performance.

Market notes

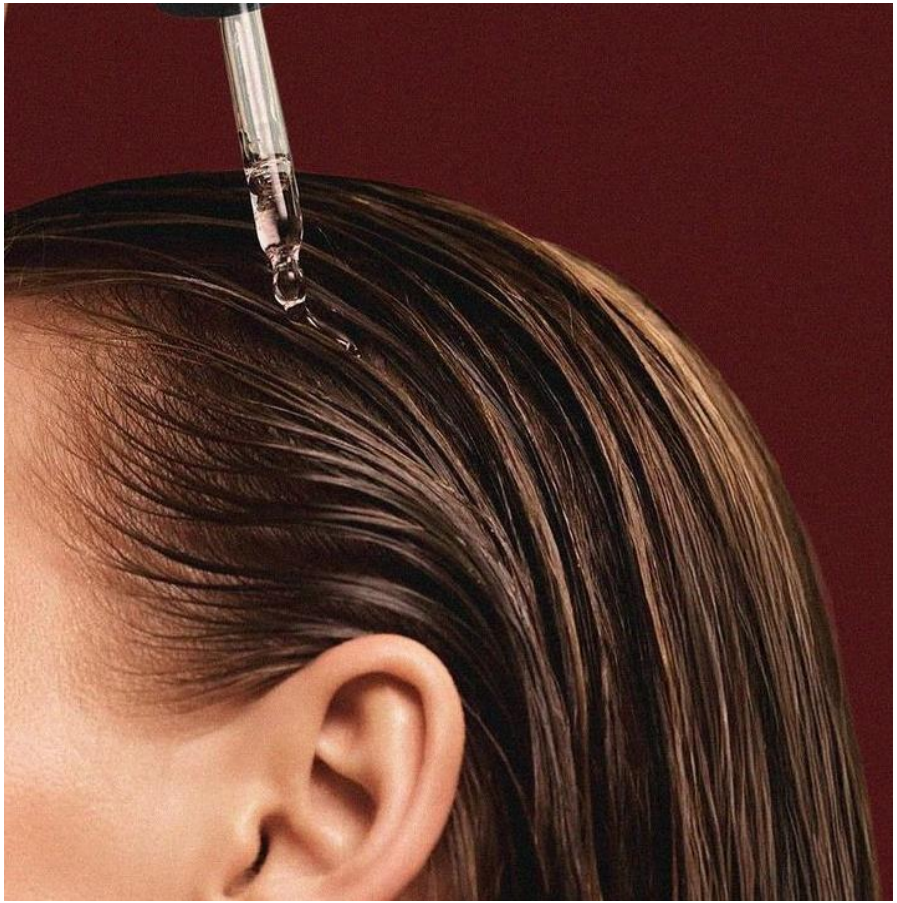
Indicative treatment price: €50–90

Target consumer: Results-driven consumers seeking clinically supported, concern-specific solutions

Distribution: DTC, prestige beauty, selective retail and professional / expert-led channels



Credits: Act + Acre



2.2 The botanical naturalist

Nature is positioned not as an alternative to efficacy, but as a credible source of performance, ritual and provenance.

- Botanical credibility comes from clearly identified ingredients, sourcing and a strong connection between formula and ritual.
- Plant oils, extracts and naturally derived actives anchor the product story, while sensorial textures and massage reconnect treatment with wellbeing and heritage.
- Earthy palettes, tactile materials and ingredient-led imagery make nature visible without relying on generic “green” codes.
- The strongest expressions combine naturality with substantiated performance, making efficacy part of the botanical proposition rather than its opposite.

Market notes

Indicative treatment price: €35–65

Target consumer: Consumers seeking naturality, sensoriality and ingredient transparency without compromising efficacy

Distribution: DTC, clean beauty, premium retail and selective salons

2.3 The luxury ritualist

Luxury reframes scalp care as an elevated treatment experience where performance, sensoriality and service carry equal weight.

- High-performance formulas and sophisticated textures give the ritual credibility beyond indulgence alone.
- Massage gestures and sensorial application turn scalp care into a deliberate moment of treatment and self-care.
- Refined materials, considered weight, restrained typography and editorial imagery build prestige without excessive decoration.
- Consultation, expert application and premium service extend the experience beyond the product itself.

Market notes

Indicative treatment price: €70–210+

Target consumer: Affluent consumers seeking high-performance care combined with an elevated ritual and service experience

Distribution: Luxury beauty retail, department stores, premium salons and brand boutiques





2.4 The personalised coach

Personalisation shifts scalp care from a fixed product offer to a system built around individual needs and changing conditions.

- Diagnosis identifies scalp concerns, routines and contextual factors before recommending care.
- Products and regimens are structured around individual needs rather than broad hair types, making treatment feel more precise and relevant.
- Digital consultations, data-led recommendations and consumer feedback allow routines to evolve over time.
- Clear interfaces, approachable visual codes and inclusive imagery make technology feel supportive rather than clinical or complex.

Market notes

Indicative treatment price: €45–60

Target consumer: Digitally engaged consumers seeking solutions tailored to their specific scalp and hair needs

Distribution: Primarily DTC, supported by digital consultation and recurring purchase models



3.0 Emerging trends

Scalp care is entering a more mature phase of innovation. The opportunity now lies not simply in adding more products, but in making treatment more specific, more intuitive and more connected over time.

3.1 Skinification

3.2. Sensoriality

3.3 Digitalisation

3.1 Skinification

"From skinification to scalp-specific science"

Skinification helped establish the scalp as an extension of skin, introducing familiar actives such as salicylic acid, niacinamide and ceramides into haircare.

But ingredient crossover alone is no longer the innovation. Research and formulation are becoming more scalp-specific, with growing attention to barrier integrity, sebum regulation, microbial balance and the biological processes linked to thinning and ageing.

The opportunity for brands is greater precision: moving from products that simply look like skincare to solutions built around distinct scalp conditions, supported by claims and testing that demonstrate why they work.







3.2 Sensoriality

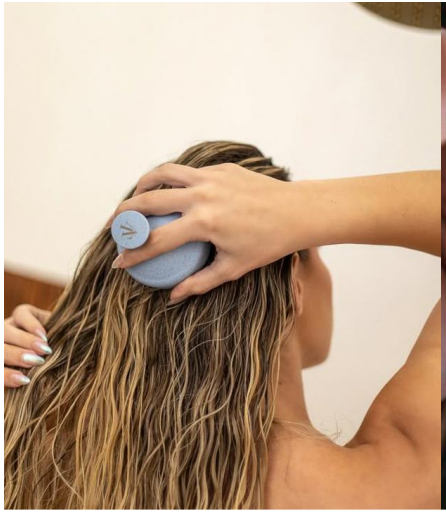
"When the experience becomes part of the treatment"

The rise of head spas and scalp tools is changing what consumers expect from scalp care.

Scalp massagers grew +57.7% year-on-year across Google, TikTok and Instagram, while professional head-spa rituals are bringing analysis, cleansing, exfoliation, massage and treatment into one experience.

This is pushing sensoriality beyond fragrance and premium texture: cooling effects, easy-rinse formulas, non-greasy finishes, targeted applicators and massage gestures make treatment more intuitive and satisfying to use.

Sensorial design has a functional role: helping consumers understand where, how and why a treatment should be used.







Credits: OUAI

3.3 Digitalisation

"Diagnosis becomes part of the product experience"

Scalp diagnostics are moving from subjective consultations toward measurable analysis.

Kérastase K-Scan, for example, combines 4K imaging, three types of light and AI trained on more than 12,000 images to assess parameters including oiliness, irritation, dandruff, thickness and density.

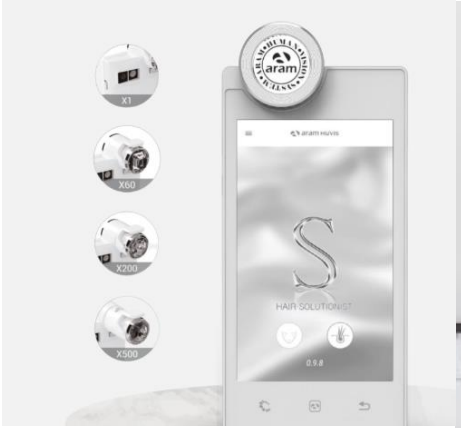
This changes the role of technology in scalp care.

Instead of simply recommending a product, it can make invisible conditions visible and give consumers a clearer reason behind the prescription.

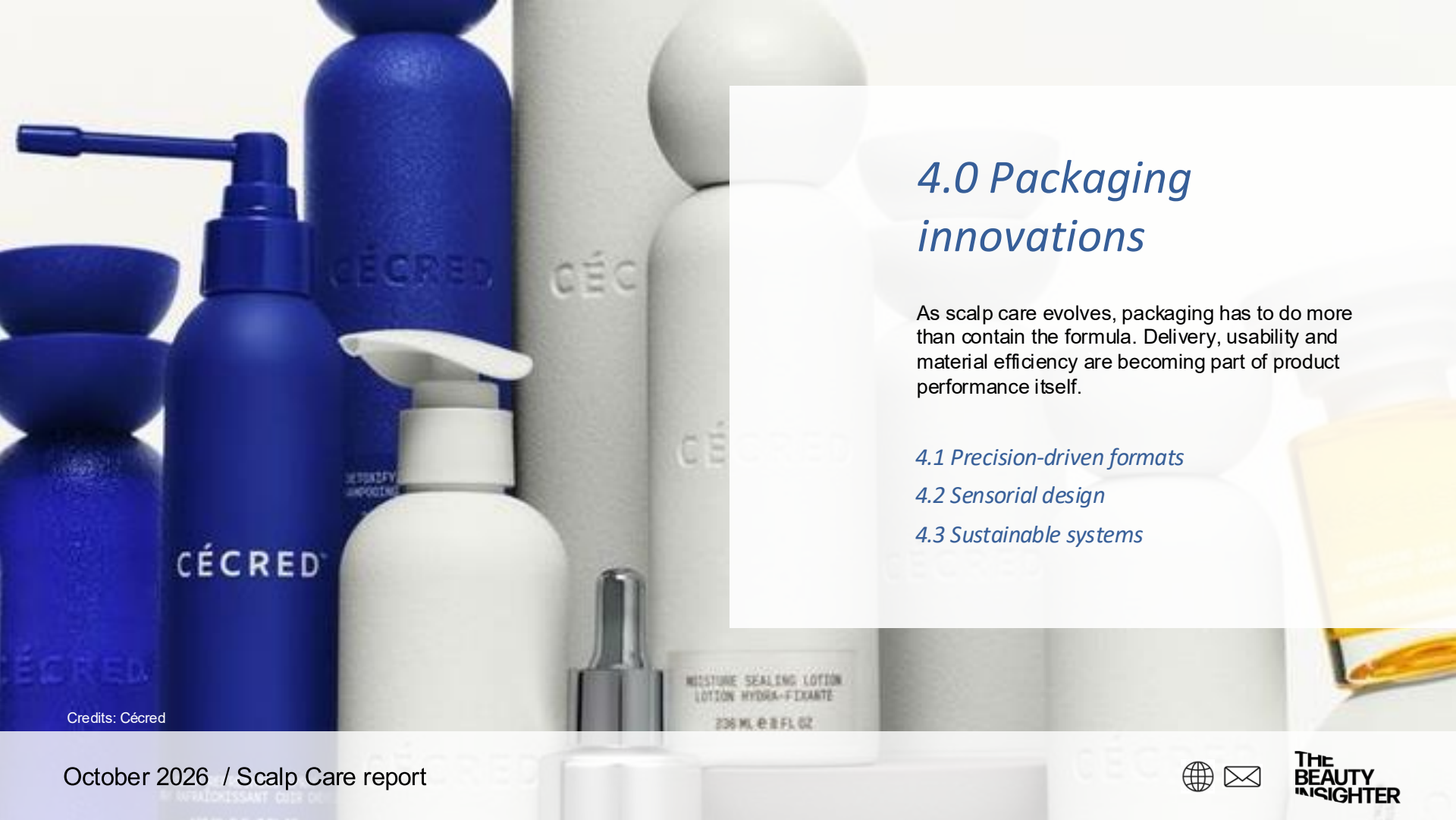
The next opportunity is to connect these moments over time (diagnosis, recommendation, treatment and progress) creating a more informed and continuous care journey.



Credits: Kerastase K-scan







4.0 Packaging innovations

As scalp care evolves, packaging has to do more than contain the formula. Delivery, usability and material efficiency are becoming part of product performance itself.

4.1 Precision-driven formats

4.2 Sensorial design

4.3 Sustainable systems

Credits: Cécred

4.1 Precision-driven formats


Credits: Kitsch



Credits: Mamaforest


Credits: MinTree

From standard bottles to engineered scalp tools

Scalp treatments need to reach the root directly, often through dense hair and across small or sensitive areas. This puts more pressure on dosage, control and ease of application than in conventional haircare.

Key developments:

Airless pumps:

Useful for protecting sensitive formulas and delivering consistent doses.

Droppers & rollers:

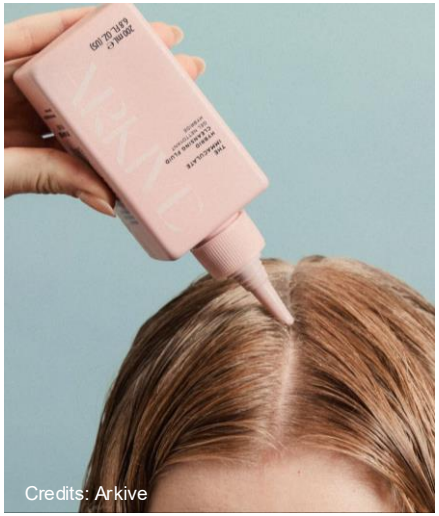
Allow direct application to specific areas; rollers can also support controlled massage.

Solid formats:

Bars and sticks reduce water content and offer compact, portable alternatives for selected treatment types.

Ergonomic shapes:

Fine nozzles, comb tips and directional formats help separate the hair and place formula where it is actually needed.


Credits: Arkive


Credits: Aveda

Packaging innovation will shift scalp care from **“how it feels”** to **“how precisely it performs.”**

4.2 Sensorial design



Credits: Authentic beauty concept



Credits: Wellbel

Turning product use into a wellness gesture

Scalp packaging is handled differently from most haircare. It is held close to the head, moved through the hair and often used with one hand, making physical interaction especially important.

Design shifts:

Surface textures

Matte, soft-touch and tactile finishes can improve grip while reinforcing a more considered product feel.

Shape & weight

Balanced forms make application steadier and easier to control around the scalp.

Color language

Muted, clinical or wellness-led palettes continue to help consumers navigate between treatment, sensitivity and self-care propositions.

Application gesture

Rollers, massage tips and flexible contact surfaces can build a physical benefit directly into the pack.



Credits: Cécred

Here, sensoriality comes from interaction, not decoration.

4.3 Sustainable systems

Making eco-design part of premium value

Sustainability in scalp care faces a practical tension: many treatment packs rely on small components, mixed materials and specialised applicators that are difficult to simplify.



Credits: Authentic beauty concept



Credits: Rosemary

Major implementations:

Recycled & bio-based materials

PCR plastics, aluminium and alternative materials are being used to reduce reliance on virgin resources where technically viable.

Refillable formats

Refills make most sense when the primary pack is durable enough to justify repeated use.

Lightweight design

Reducing unnecessary material, secondary packaging and component count can lower impact without changing the consumer routine.

On-Pack transparency

Clear material and disposal information is becoming more important as recyclability requirements become stricter.

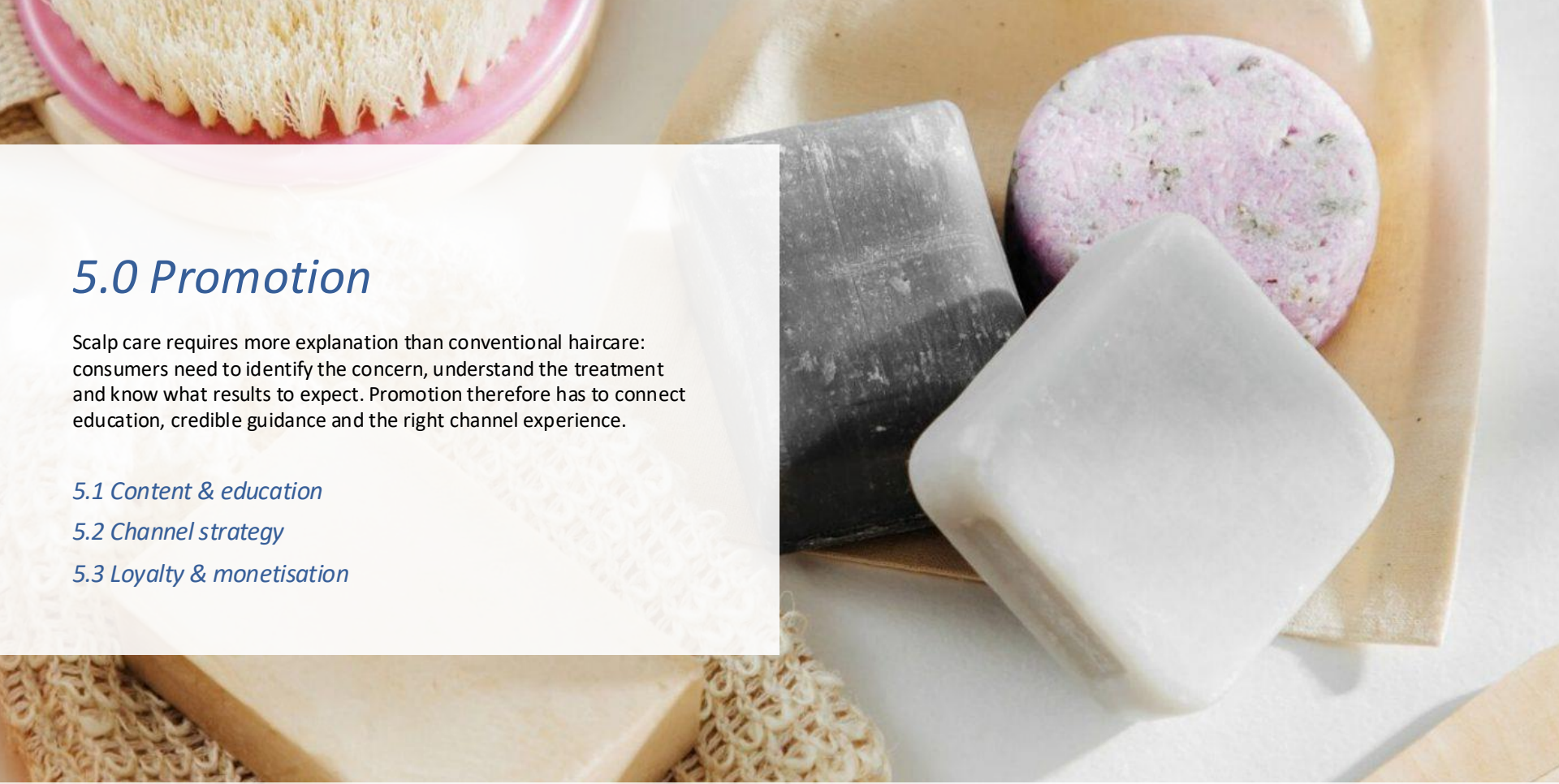


Credits: Zero Waste



Credits: Athé

The strongest systems reduce material impact without compromising applicator performance or premium cues.



5.0 Promotion

Scalp care requires more explanation than conventional haircare: consumers need to identify the concern, understand the treatment and know what results to expect. Promotion therefore has to connect education, credible guidance and the right channel experience.

5.1 Content & education

5.2 Channel strategy

5.3 Loyalty & monetisation

5.1 Content & education

Building trust through knowledge

Scalp serum content on TikTok grew +38.4% year-on-year in 2025, with reviews and educational posts driving visibility around hair growth, hair loss and thinning.

As formulas and claims become more specialised, ingredient naming is not enough.

Brands need to explain the concern being addressed, how the formula works, how it should be used and what consumers can realistically expect.

Proof also needs translation. Clinical results, expert input and before-and-after evidence are most useful when consumers can understand what was tested, on whom and over what period.

In scalp care, education does not sit around the product story. It helps consumers judge whether the product is relevant to them.







5.2 Channel strategy





From education to action

Hair has an unusually digital purchase journey: in 2025, it was the only U.S. prestige beauty category where online accounted for the majority of retail sales.

Convenience ranked first among reasons for purchasing haircare online, followed by replenishment.

Physical channels still play a different role. Salons can add consultation, professional treatment and diagnosis, giving consumers access to expertise that is harder to replicate through e-commerce alone.

This creates distinct roles across the journey: content supports discovery and education;

e-commerce simplifies purchase and replenishment, salons add diagnosis and service; specialist retail enables comparison and trial.

The strongest channel strategies connect these roles rather than reproducing the same experience everywhere.

5.3 Loyalty & monetisation

Turning care into recurrence

Scalp treatments are well suited to repeat purchase when they become part of an established routine.

Replenishment is already the second most cited reason for buying prestige haircare online in the U.S.

Relevance matters too. Products for specific hair types remain consumers' leading hair-health priority, cited by 44.7% of respondents, ahead of ingredients, treatments or scalp-health products.

For brands, retention can be built around the routine rather than a single SKU:

complementary treatment steps, clear usage cycles, replenishment prompts and reassessment when needs change. The commercial value comes from giving consumers a reason to continue the regimen, not simply from adding more products.







„SCALP CARE IS NO LONGER A NICHE FIX. IT IS BECOMING A NEW LAYER OF HAIRCARE. MORE TARGETED, MORE SENSORIAL AND MORE CONNECTED"

Juan Campderà

Founder of Aktiva

Thank *you!*

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