

# Report Deck

## *SCALP CARE*

**THE  
BEAUTY  
INSIGHTER**

*“WHEN SKINCARE LOGIC  
MOVES TO THE SCALP:  
BRIDGING THE SCIENCE—  
WELLNESS GAP IN  
HAIRCARE”*

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# INDEX

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## 1. MARKET CONTEXT

1.1 Market data

1.2 Consumer insights

## 2. BRAND ARCHETYPES

2.1 The scientific expert

2.2 The visionary naturalist

2.3 The luxury ritualist

2.4 The wellness devotee

## 3. EMERGING TRENDS

3.1 Skinification

3.2 Sensoriality

3.3 Digitalization

## 4. PACKAGING INNOVATIONS

4.1 Precision-driven formats

4.2 Sensorial design

4.3 Sustainable systems

## 5. PROMOTION

5.1 Content & activation

5.2 Channel strategy

5.3 Loyalty & monetization

1.0

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# MARKET CONTEXT

Scalp care is poised to redefine wellness, transcending traditional beauty into a \$100B+ arena driven by discerning consumers rewriting self-care norms.

1.1 Market data

1.2 Consumer insights

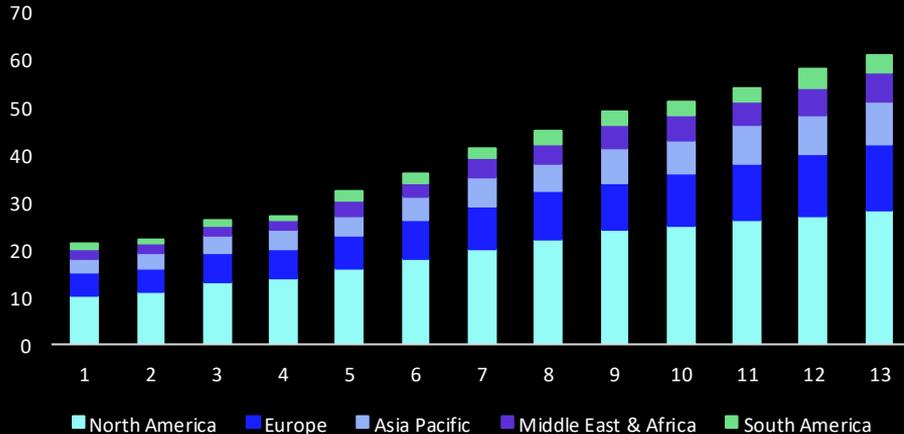


# 1.1 MARKET DATA

## GLOBAL MARKET VALUE

*\$14.7 B in 2025 → \$23.8 B by 2032 (+7.1 % CAGR)*

*Scalp care grows 2× faster than overall haircare (+6.4 % CAGR),  
now accounting for 15 % of the total category value.*



## CATEGORY STRUCTURE

- *Anti-dandruff (38 %) and anti-hair-loss (28 %) remain the core business pillars*
- *Premium & treatment formats (serums, ampoules, exfoliants) ≈ 30 % of sales*
- *Higher average margins (+20–25 %) vs. mass haircare*

*Value creation shifts from volume to premium care and repeat routines*

## REGIONAL DYNAMICS

- *Asia-Pacific — 42 % of global sales | +9–10 % CAGR*  
*Driven by urban pollution, stress, and Ayurveda-inspired biotech*
- *North America — 28 % share | +7 % CAGR*  
*Strong demand for clean dermocosmetic and tech-driven DTC brands*
- *Europe — 23 % share | +6 % CAGR*  
*Growth led by premium pharmacy and wellness-positioned products*
- *Latin America & MEA — 7 % share | Early adoption*  
*Emerging interest in affordable scalp health and natural ingredients*

## 5.1 CONTENT & EDUCATION

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*36% of U.S. urban households use a scalp product monthly*

Scalp care is now a daily act of self-care. Consumers view it as essential to stress management, confidence, and total wellbeing, reflecting the “**skinification**” of hair routines.



*28% of U.S. DTC scalp care spend now comes from men*

Scalp care doesn't carry social stigma for men. This shift shows a broader trend: male consumers embracing self-care as personal empowerment, opening new innovation playgrounds for brands.

*Expert-driven credibility*

There's rising belief in advanced, “bio-intelligent” beauty.

Consumers want solutions that anticipate needs and respect personal biology, positioning scalp care as a proactive health ritual.



## 2.0

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# *BRAND ARCHETYPES*

Four poles define the space: trust in science, a craving for purity, a desire for ritual, and the hunger for personalized empowerment.

2.1 The scientific expert

2.2 The visionary naturalist

2.3 The luxury ritualist

2.4 The wellness devotee

## 2.1 THE SCIENTIFIC EXPERT

*Today's discerning scalp care consumer demands transparent validation. Brands that fuse rigorous science with authentic proof differentiate themselves in a saturated market.*

- Minimalist clinical white and crystalline materials embody scientific purity and integrity.
- Typography functions as a testament to precision, emphasizing clear, credible ingredient disclosure.
- Sophisticated applicators curate a deliberate, ritualized consumer experience, reinforcing efficacy.
- Photography harnesses clinical austerity balanced with approachable professionalism, fostering trust.

### Market notes

Price Point: €30–€50

Target Consumer: Informed, efficacy-oriented urban professionals

Distribution: Pharmacies, specialized salons, luxury retail environments



## 2.2 THE VISIONARY NATURALIST

*As ecological literacy evolves, consumers expect scalp care brands to authentically integrate sustainability, material integrity, and sensory legitimacy.*

- Use of recycling-forward materials such as frosted glass and bioplastics signals genuine ecological accountability.
- Muted, earthy color palettes paired with botanical design narrate provenance and craftsmanship.
- Textural design elements invite multi-sensory engagement, enhancing perceived product authenticity.
- Photographic storytelling emphasizes natural light and context, fostering an immersive, credible brand narrative.

### Market notes

Price Point: €18–€32

Target Consumer: Environmentally engaged Millennials and Gen Z

Distribution: Specialty eco-conscious retailers, DTC platforms



## 2.3 THE LUXURY RITUALIST

*In the premium scalp care domain, luxury transcends efficacy: it crafts sensorial ceremony, marrying performance with emotional and aspirational brand resonance.*

- Premium heavy glass with gilded accents commands tactile luxury and brand prestige.
- Rich, jewel-toned color schemes harmonize with elegant typography to evoke timeless sophistication.
- Cinematic, editorial photography conjures immersive aspirational stories of wellness and indulgence.
- Luxe materials with velvet matte and soft-touch finishes create layered sensory appeal.

### Market notes

Price Point: €45–€80

Target Consumer: Affluent individuals seeking differentiated self-care rituals

Distribution: Premium salons, luxury retail establishments



## 2.4 THE WELLNESS DEVOTEE

*Personalization redefines product ownership, empowering consumers through wellness tech and tailored rituals aligned to their unique biology*

- Modular, refillable solutions encourage eco-friendly personalization frameworks.
- Bold and inclusive visual language embraces diversity in hair type and consumer stories.
- Richly layered digital narratives and AI-driven diagnostics build lasting consumer relationships.
- The design blends forward-thinking minimalism with human warmth, bridging science and lifestyle.

### Market notes

Price: €25–€45

Target: Urban wellness-minded consumers seeking tailored experiences

Channels: E-commerce, boutique wellness stores



## 3.0

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# *EMERGING TRENDS*

Between the brand archetypes is an open space full of potential. The chance is to create simple but powerful experiences that mix transparency, technology, and ritual. Here, purity meets personalization, and stories become sensory moments, inviting consumers to rethink self-care and scalp health.

3.1 Skinification

3.2 Sensoriality

3.3 Digitalization



## 3.1 SKINIFICATION

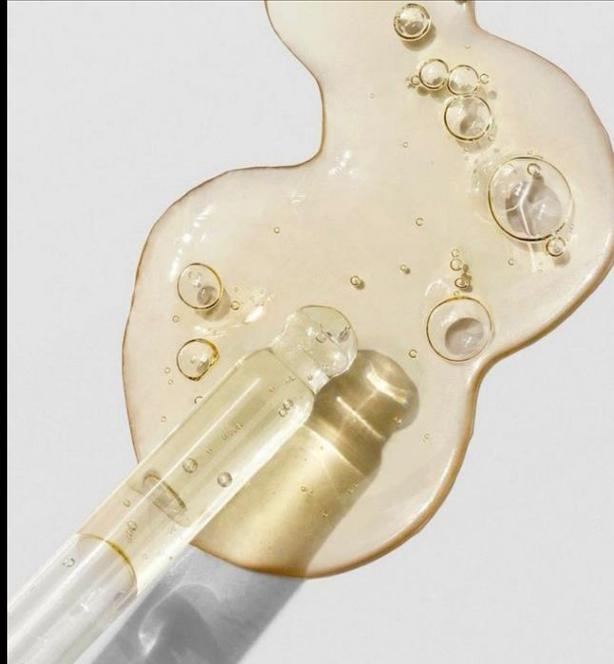
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*“When scalp care adopts the logic of skincare”*

Scalp care now operates like skincare: consumers expect formulas with proven clinical actives (niacinamide, peptides, probiotics, ceramides). Brands that deliver scientific evidence with visible results set the benchmark for trust and credibility.

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Ingredient storytelling, transparency about origins, and clear claims are now table stakes. Consumers want to know how and why actives work, empowering them to make confident, informed choices.



## 3.2 SENSORIALITY

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*“From corrective care to emotional wellbeing”*

Light, non-greasy textures and signature soothing fragrances transform scalp care into a sensorial escape, elevating perceived value beyond simple utility and driving repeat use.

In a science-driven category, sensorial pleasure is the trigger for long-term loyalty.

Scalp care routines now include massage gestures, specialized tools, and multi-step layering, which ritualize self-care and foster emotional attachment. *Wellness and relaxation are inseparable from treatment.*



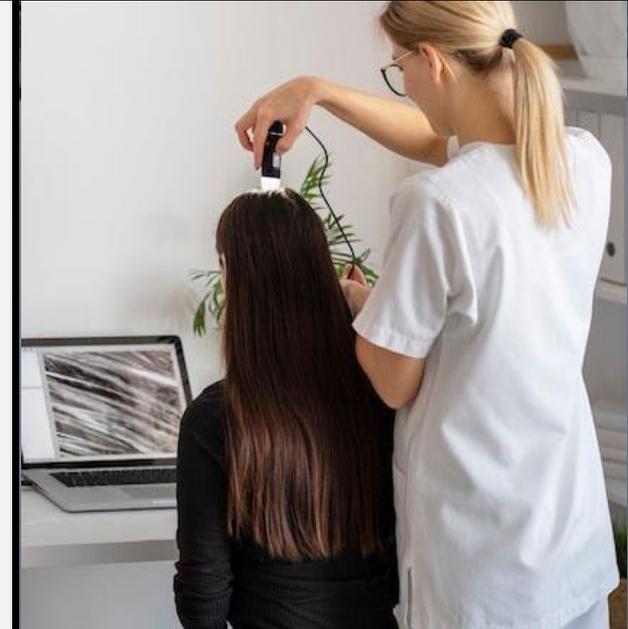
### 3.3 DIGITALIZATION

*“Technology as the bridge between science and self-care”*

Smart scalp analyzers and AI-driven apps collect detailed data on scalp condition, enabling personalized, real-time recommendations that adjust to environmental and hormonal changes. *By 2026, AI diagnostics will account for 30% of scalp care product recommendations.*

Personalization powered by technology transforms scalp care from product use into an evolving, engaging wellness service.

Brands harness data to create adaptive ecosystems, guiding users through tailored routines that improve efficacy and deepen long-term loyalty by making self-care responsive and dynamic.





## 4.1 PRECISION-DRIVEN FORMATS

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*From standard bottles to engineered scalp tools*

Scalp care targets precise, sensitive areas such as roots and patches of irritation. Most haircare packaging lacks the control, hygiene, and ergonomics needed for these applications.

**Key developments:**

*Airless pumps:*

Protect active ingredients and deliver measured doses.

*Droppers & rollers:*

Enable targeted use with minimal waste; rollers add light massage benefits.

*Solid formats:*

Eco-friendly bars and sticks with low water content meet portability and sustainability needs.

*Ergonomic shapes:*

Easy grip and multi and precise applicators simplify multi-step routines and hard-to-reach zones.

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



## 4.2 SENSORIAL DESIGN



*Turning product use into a wellness gesture*

Scalp care is both a treatment and a self-care ritual. Packaging touchpoints influence the emotional connection and perceived value of the routine.

**Design shifts:**

*Surface textures*

Soft-touch or matte finishes create a soothing, high-quality feel.

*Shape & weight*

Balanced proportions convey stability and craftsmanship.

*Color language*

Neutral, mineral, or pastel tones signal cleanliness and calm.

*Scent interaction*

Emerging micro-diffusion features enhance the sensory ritual.

**In a category built on science, emotion resonance will become the real differentiation code.**



## 4.3 SUSTAINABLE SYSTEMS



### *Making eco-design part of premium value*

Consumers expect sustainability across all wellness categories but refuse to compromise on performance or aesthetics. Scalp care sits at this intersection.

### **Major implementations:**

#### *Recycled & bio-based materials*

PCR plastics, glass, or aluminum standardizing across launches.

#### *Refillable formats*

Encourage long-term use and reduce waste.

#### *Lightweight design*

Fewer components and optimized sizing cut costs and footprint.

#### *On-Pack transparency*

Information sharing sourcing and recyclability engagement.

**Sustainability will separate brands that adapt from those that disappear.**



5.0

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## *PROMOTION*

Authenticity crystallizes through expert narratives, compelling storytelling, and immersive tech-driven experiences that turn fleeting attention into lasting allegiance.

5.1 Content & activation

5.2 Channel strategy

5.3 Loyalty & monetization



## 5.1 CONTENT & EDUCATION

### *Building trust through knowledge*

Educational content has become the primary discovery driver in scalp care, with TikTok content (#scalphealth, #scalpcare) **surpassing 1B views in 2025**, reflecting a strong shift toward science-based self-education.



#### MADE WITH

amla  
ginseng  
turmeric  
patented bio-fermented blend

#### BENEFITS

reduces hair loss\*  
instantly thickens to lift hair at the root  
invigorates the scalp

#### THE PROOF

best-seller  
4 out of 5 say hair looks thicker\*\*  
100% vegan



Transparency is a differentiator. Brands validating efficacy through clinical trials and real-world data turn scientific proof into premium value, **with 85% of consumers willing to invest more in proven products.**

Expert-driven credibility reinforces confidence in a complex category, as **63% of consumers report higher trust in brands recommended by or** dermatologists or trichologists.



## 5.2 CHANNEL STRATEGY

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### *From education to action*

Diagnostic-led retail reframes the point of sale as a care experience: AI scalp scans and sensory tools generate personalized data profiles, shifting retail from a one-off transaction to a continuous care loop.



### *Wellness partnerships*

Partnerships with fitness, mindfulness, and nutrition brands turn scalp care into part of lifestyle maintenance. Positioning shifts from “problem-solution” to daily equilibrium and emotional wellbeing.

Digital-to-physical conversion accelerates as online education triggers in-store testing, expert consultations, and tailored routines.

Omnichannel precision, enabled by unified data across retail, e-commerce, and CRM, allows brands to adapt messaging and recommendations to real-time scalp conditions, improving consistency and conversion.



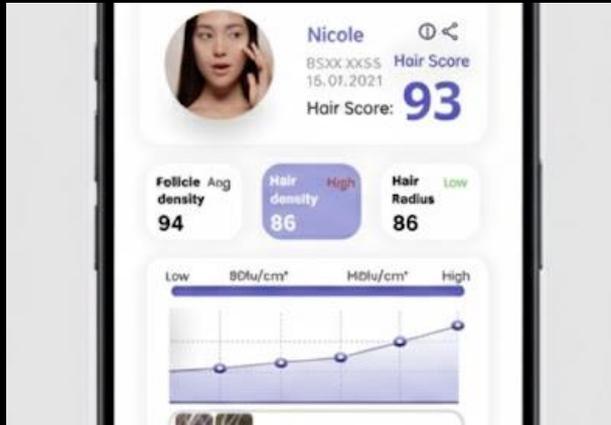
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## 5.3 LOYALTY & MONETIZATION

### *Turning care into recurrence*

Loyalty is increasingly driven by personalization, with **44.7% of consumers expecting products tailored to their hair type**, pushing brands toward adaptive routines.



Because scalp conditions change, consumers no longer stay loyal to one product, but to brands that adjust care over time, across changing needs, touchpoints, and moments of care.

Over time, brands that manage this continuity build stronger retention and higher lifetime value than those relying on static product cycles.



Next-phase brands are moving beyond static products. **Predictive technologies** adjust formulations and refill intervals based on hydration, sebum, or sensitivity data, creating a loop where performance improvement reinforces routine use and long-term loyalty.

*“THE NEXT ERA OF BEAUTY STARTS WITH CARE THAT  
PROTECTS.  
SIMPLY, INTELLIGENTLY, EVERYDAY.”*

Juan Campderà

Founder of Aktiva

Thank *you!*

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