



By **eternis** 

NO ROUTINE, JUST RELEVANCE: READING THE FUTURE OF HAIR CARE FOR 2026

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AGENDA

Magical world of Hair Care

Beauty Tarot overview

The Empress – Pantrofina™ Remedy

Strenght – Sharohyal™ Moringa

The Moon – Sharohyal™ Rice

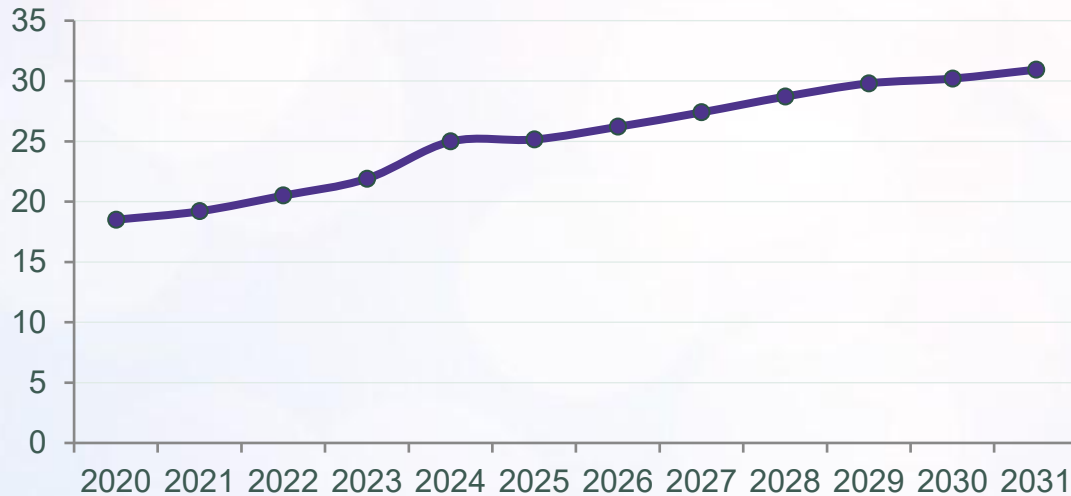


Magical world of Hair Care



EUROPEAN HAIR & SCALP CARE: MARKET OVERVIEW

Europe Hair & Scalp Care Revenue (\$B)



Europe leads the global hair care market with 36.67% share (2025), generating \$41.77B. Hair care is the 3rd largest product category across European cosmetics at €18.1B. Prestige segment grew 15% in H1 2024, driven by real consumer demand (12% unit growth), not just price increases. Online buyers in Europe reached 77% in 2024, accelerating e-commerce channel growth.

EUROPEAN HAIR & SCALP CARE: MARKET OVERVIEW

€18.1B

Hair care retail sales
(Europe 2024)

€104B

Total European cosmetics
& personal care retail 2024

3rd

Hair care is 3rd largest
category in Europe

3.5M

Jobs supported by cosmetics
industry across Europe

+15%

Prestige hair care growth
Jan–Jun 2024 (Circana)

68.2%

Women's segment
share 2024



Europe leads the global hair care market with 36.67% share (2025), generating \$41.77B. Hair care is the 3rd largest product category across European cosmetics at €18.1B. Prestige segment grew 15% in H1 2024, driven by real consumer demand (12% unit growth), not just price increases. Online buyers in Europe reached 77% in 2024, accelerating e-commerce channel growth.

PRODUCT TYPE MIX & REVENUE BY CATEGORY

Shampoo

Sulfate-free, microbiome-friendly, pH-balanced formats dominating new launches. Anti-dandruff still #1 subclaim.

€4.5B projected by 2035

Scalp Treatments

APAC innovation migrating to EU. Salon scalp analysis services rising. Serum formats launched by L'Oréal, Eucerin.

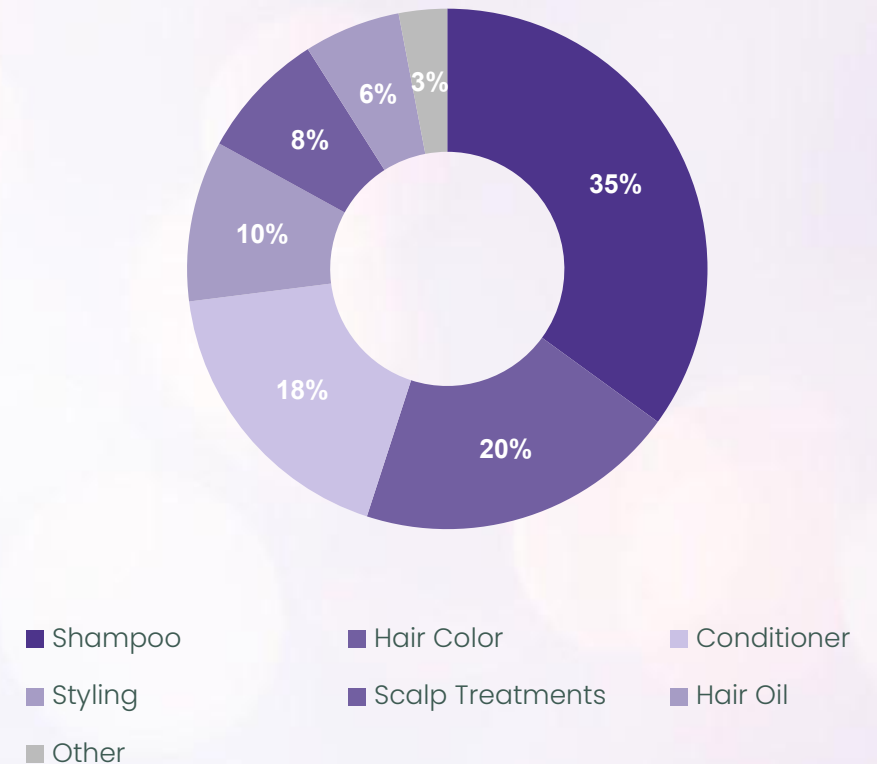
+11.7% YoY fastest growth

Styling

Skinification migrating to styling. Bond-repair concentrates, niacinamide serums as styling products.

+4.59% CAGR – fastest styling growth

Revenue Share by Product Type (%) – 2024



MACRO TRENDS RESHAPING EUROPEAN HAIR & SCALP CARE

Scalp Skinification

Scalp treated as skin: serums, exfoliants, barrier repair. Beiersdorf launched Eucerin Scalp range with piroctone olamine & panthenol (2024). EU Cosmetic Regulation now explicitly supports clinical claims like 'supports hair density'.



MACRO TRENDS RESHAPING EUROPEAN HAIR & SCALP CARE

Sustainability & EU Regulation

EU Greenwashing Directive 2024/825 (effective March 2026) requires evidence for eco-claims. Microplastics ban for rinse-off products by 2027. Recyclable packaging now in 79% of new German launches.



MACRO TRENDS RESHAPING EUROPEAN HAIR & SCALP CARE

Premiumisation & Prestige Growth

Prestige hair care +15% H1 2024 across Europe (Circana), driven by unit growth — not just price. Kérastase, Olaplex, Augustinus Bader expanding scalp-prestige positioning.



MACRO TRENDS RESHAPING EUROPEAN HAIR & SCALP CARE

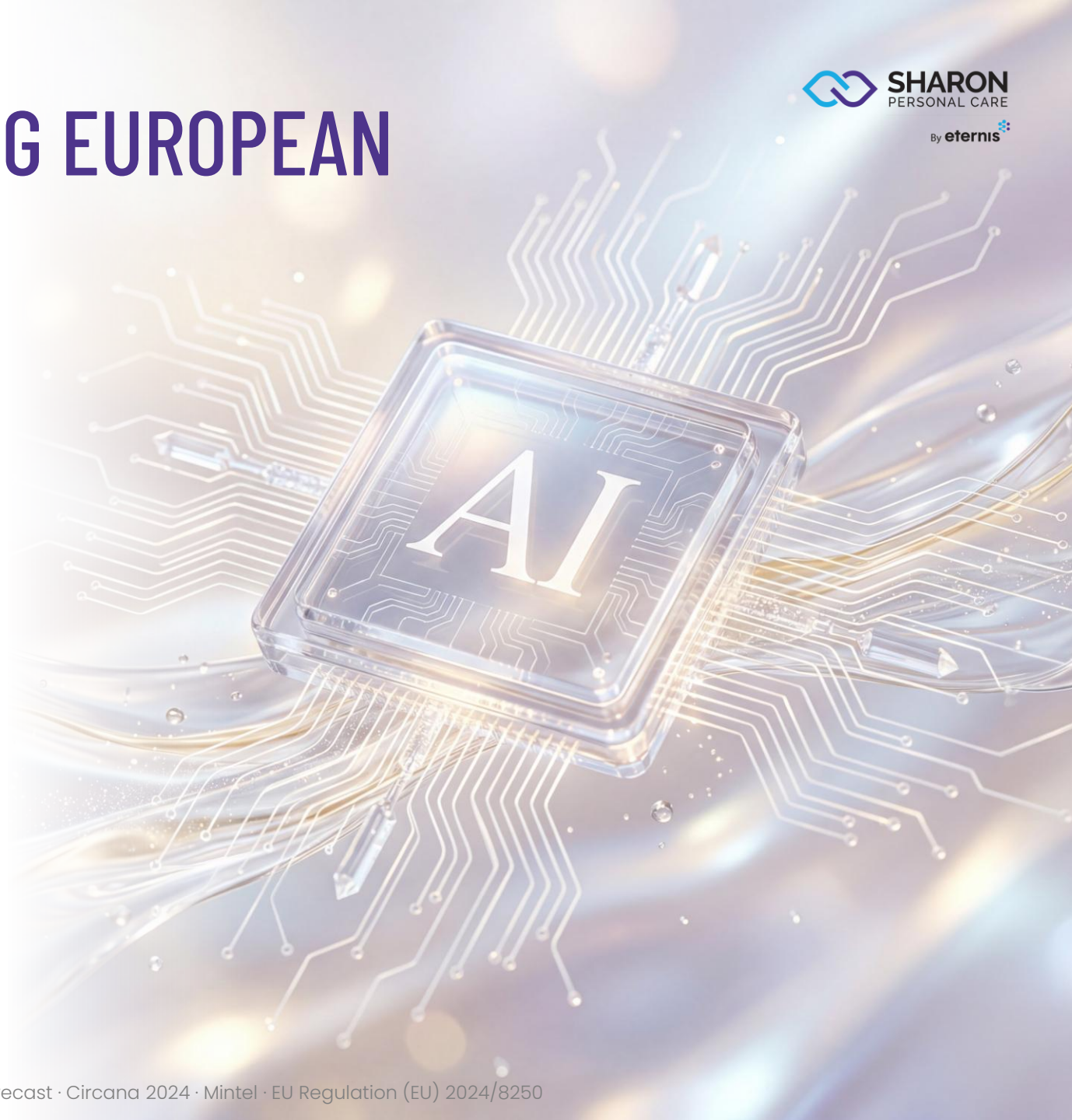
Bond Repair & Damage Science

Olaplex-led bond-repair wave now mainstream. L'Oréal acquired Color Wow (June 2025) and Medik8 (Oct 2025) targeting styling innovation and dermatologist-endorsed scalp care.

MACRO TRENDS RESHAPING EUROPEAN HAIR & SCALP CARE

AI Personalization & Digital Dx

Brands offering AI scalp diagnostics, online hair profiling, bespoke shampoo formulation. Satisfaction scores 25% higher with AI-powered vs. traditional recommendations. 77% Europeans shop online (2024).



MACRO TRENDS RESHAPING EUROPEAN HAIR & SCALP CARE

Gender Diversification & Men's Grooming

Men's hair care growing steadily across Western Europe. Alpecin caffeine shampoo, Balea MEN Scalp Care leading. Hair loss onset at 35 for 50% of European men drives health-first engagement.

DISTRIBUTION CHANNELS & DIGITAL COMMERCE – EUROPE

77%

Europeans shopping online in 2024 (EU stats)

4.3%

E-commerce CAGR 2024–2030 (fastest channel)

65%

German hair care via pharmacy/drugstore (dm, Rossmann)

+60s

TikTok #hairtok bond-repair demos outshining traditional advertising

25%

Higher satisfaction scores with AI hair analysis vs. traditional

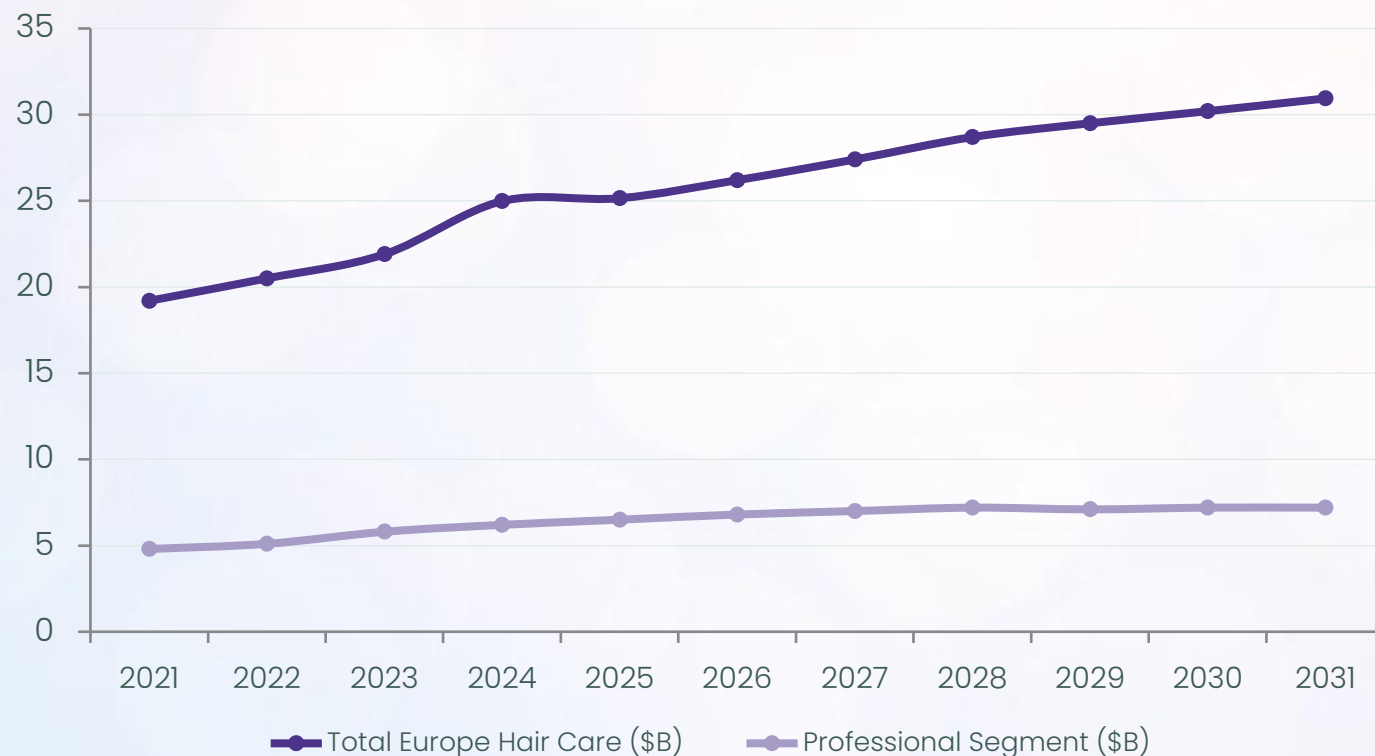
40%

User engagement uplift from virtual hair-color try-on tools



EUROPEAN MARKET FORECAST & GROWTH OUTLOOK 2025-2031

Europe Hair Care Revenue Forecast (\$B)



\$30.94B

Total market
by 2031

4.23%

CAGR 2026-2031

\$7.2B

Professional
segment 2030

3.4%

Professional CAGR
2024-2030

4.5%

Spain prof. CAGR
(fastest in EU)

3.7%

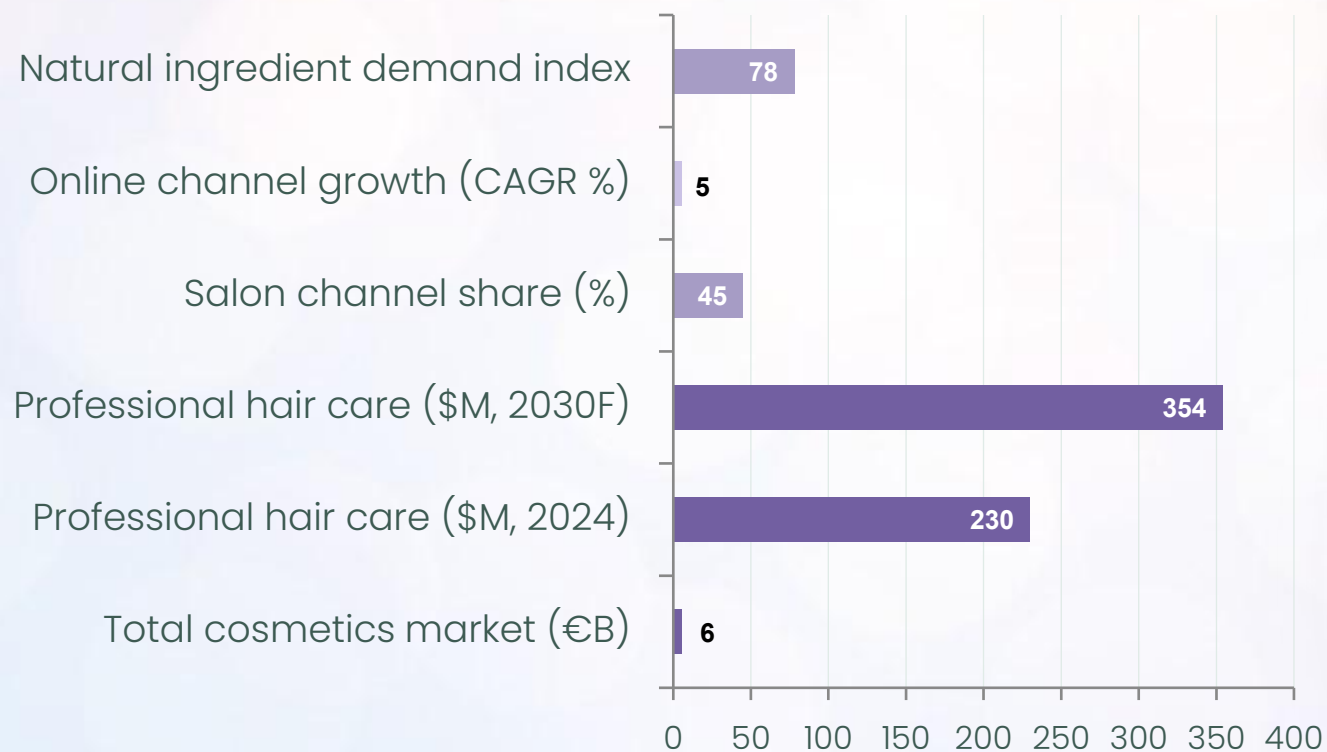
Germany
professional
CAGR 2024-2031

POLAND

MARKET DEEP DIVE

POLAND: MARKET DEEP DIVE

Poland Hair Care: Key Market Metrics



Sources: Cosmetics Europe 2024 · IndustryARC · Allied Market Research · Euromonitor Poland

Confidential Sources: Cosmetics Europe 2024 · IndustryARC Poland Professional Hair Care 2024–2030 · Allied Market Research · Euromonitor International · CosmeticsDesign–Europe

POLAND: MARKET DEEP DIVE

Market Position

6th largest cosmetics market in Europe at €5.8B (2024).
Professional hair care valued at ~\$230M, growing at 5.2% CAGR to reach \$354M by 2030.

Key Consumer Trends

Hair skinification gaining ground. Strong demand for natural/herbal ingredients. Social media (TikTok, Instagram) driving product awareness. Hair loss solutions and scalp care are fastest-growing segments.

Top Claims in Poland

Natural origin · Anti-hair loss · Scalp soothing · Sulfate-free · Color protection · Herbal actives (plant-based). Growing premium interest.

POLAND: MARKET DEEP DIVE

Distribution

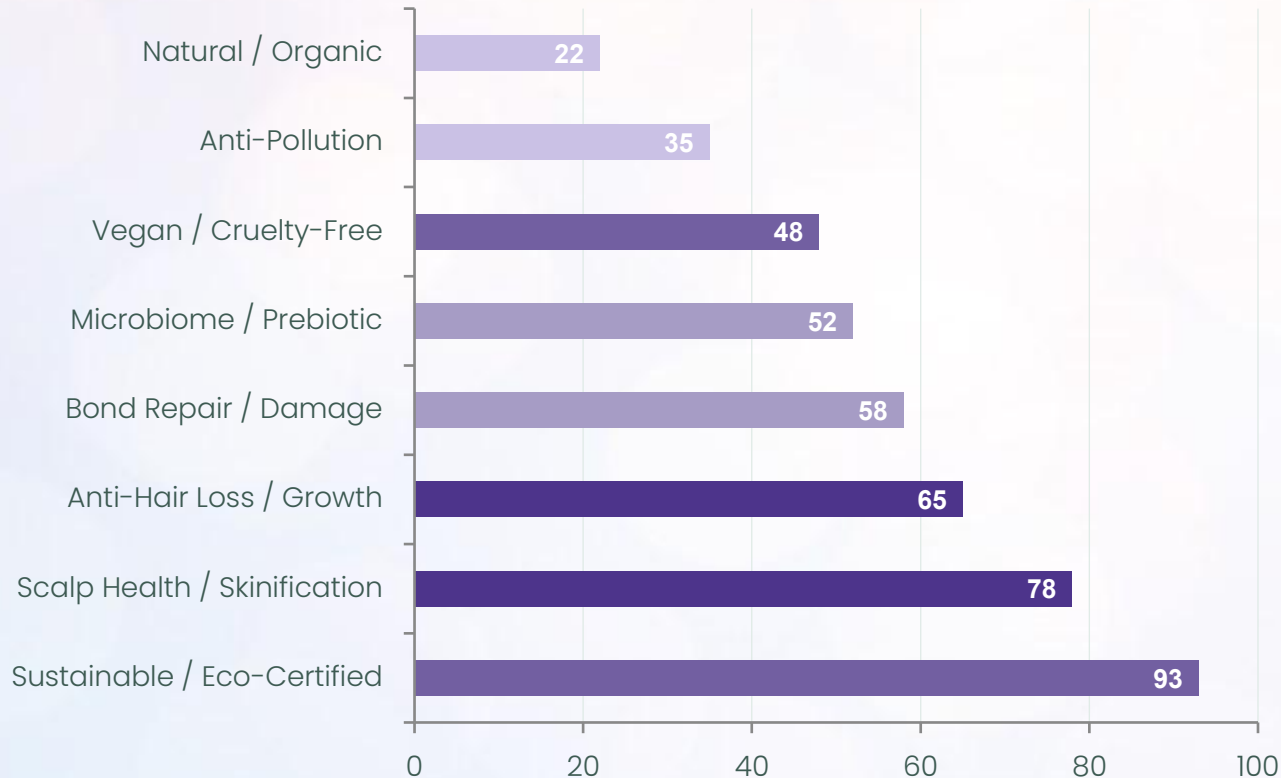
Salons remain primary channel (~45%). Hypermarkets/retail chains strong. E-commerce rapidly expanding. Pharmacy channel growing, driven by dermatologist-endorsed scalp products.

Key Drivers

Urban air pollution driving anti-pollution shampoo growth (Italy, Poland, Germany particularly cited). Rising disposable incomes. Post-COVID home salon routines sustained.

TOP CLAIMS & CONSUMER CONCERNS BY COUNTRY

% Growth in European Product Launches by Claim (2021–2024)



Sources: Mintel GNPD · Mordor Intelligence · CosmeticsDesign-Europe · Market Data Forecast



Poland

Natural / herbal ingredients · Anti-hair loss · Scalp health · Sulfate-free · Value-for-money



Germany

Anti-hair loss (caffeine) · Sustainability / eco · Scalp dermo-cosmetic · Clean label · Natural / organic



France

Luxury bond repair · Organic (COSMOS/Ecocert) · Hair color protection · Microbiome · Anti-aging hair



United Kingdom

Scalp skinification · Hair oil enriched · Bond repair · Vegan/cruelty-free · Anti-hair loss prestige



Italy

Professional/salon grade · Artisanal / heritage · Anti-pollution · Scalp sensitivity · Luxe fragrance



Spain

Humidity / frizz control · Scalp care rituals · Anti-pollution · Influencer-driven trends · Texturizing

STRATEGIC TAKEAWAYS FOR EUROPE

What the data means for brands, formulators and innovators

01 Germany is the anchor market

22.7% share, pharmacy-led, sustainability-driven.
Efficacy + clean label + recyclable packaging is the winning formula.

02 Scalp skinification is the #1 innovation driver

Scalp treated as skin. Serums, exfoliants, barrier-repair with derma actives (piroctone olamine, niacinamide, prebiotics) outperforming traditional shampoo.

03 Digital-first is the distribution strategy

77% of Europeans shop online. E-commerce growing at 4.3% CAGR.
TikTok #hairtok + AI diagnostics are replacing traditional advertising.



STRATEGIC TAKEAWAYS FOR EUROPE

What the data means for brands, formulators and innovators

04 France & Italy export premium positioning globally

France leads EU cosmetics exports (€14.9B). 'Made in France/Italy' signals luxury – leverage for premium brand building.

05 Sustainability is non-negotiable post-2026

EU Greenwashing Directive (2024/825) active March 2026. Microplastics ban for rinse-off products by 2027. Certifications (COSMOS, Ecocert) will separate winners.

06 Poland is a rising opportunity market

6th largest EU cosmetics market. Professional hair care growing at 5.2% CAGR to 2030. Natural ingredients and anti-hair-loss claims are the entry point.

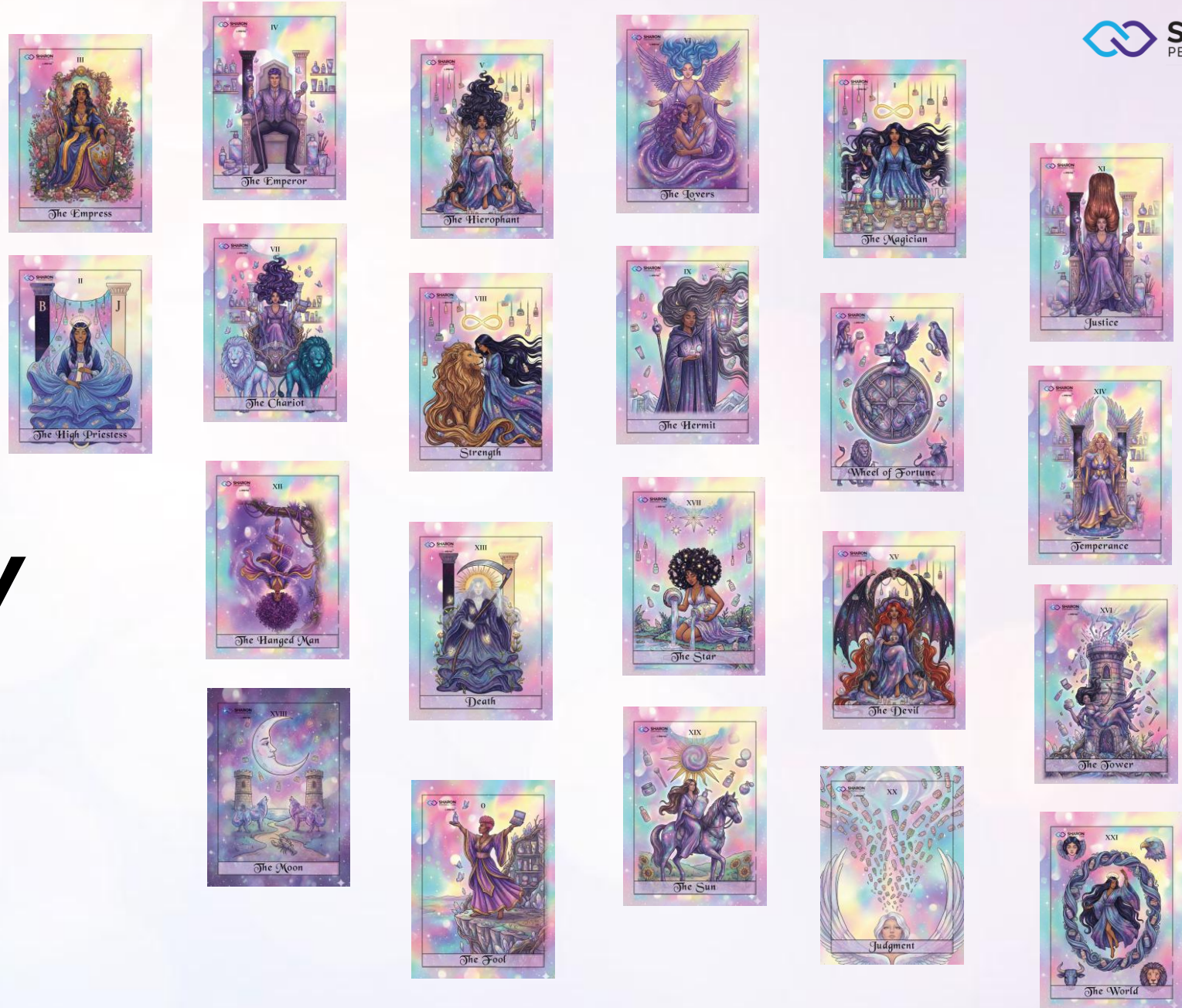




BEAUTY TAROT

BEAUTY TAROT

Overview



THE EMPRESS

Pantrofina™ Remedy

Inspired by The Empress

The Empress symbolizes **growth, abundance, and nurturing care**. PANTROFINA™ REMEDY reflects this essence by pampering and regenerating the scalp, supporting a balanced environment for healthy hair growth. Through its **protective and conditioning action**, it helps strengthen the scalp barrier while promoting softness and vitality.



SCALP BLOSSOM

2501FP_SCSC_04

	TRADE NAME	INCI	%
PHASE A	WATER	Aqua	To 100
	SHARON AQUAVITA™ 90	Niacinamide, Glyceryl Caprylate, Decylene Glycol	3
	XANTHAN GUM	Xanthan Gum	1,5
PHASE B	EMULPHARMA™ MIMESIS RSPO MB	Glycerin, Polyglyceryl-3 Cocoate, Hydrogenated Lecithin, Lecithin, Aqua	3
	SHARODERM NICOMENT	Menthyl Nicotinate, Menthol	0,5
PHASE C	SHAROFEEL DS	Diocetyldodecyl Succinate	7
	PANTROFINA™ REMEDY	Propylene Glycol, Undecylenic Acid, Arginine, Salicylic Acid, Aqua (Water)	1



**Scalp
Blossom**
2501FP_SCSC_04

SCALP BLOSSOM

2501FP_SCSC_04

FORMULATION SCIENCE PERSPECTIVE

Must have in formula

Chemical exfoliating agent to improve desquamation

Sebum control ingredients that will not disrupt scalp microbiome

Texturizing ingredients to facilitate glide of product on scalp

Non greasy ingredients, to avoid hair buildup

Skin sensory modulator for a perceivable efficacy

Our Ingredients to create it

PANTROFINA™ REMEDY: Controlled exfoliation can reduce sebaceous plug formation

SHARON Aquavita™ 90: preservative system based on niacinamide, known for sebum regulation properties and "microbiome friendly"

EMULPHARMA™ MIMESIS RSPO MB: this emulsifier creates a stable light emulsion, with a superior spreadability and lightness

SHAROFEEL DS: a rich touch emollient with a velvety, non-greasy afterfeel

SHARODERM NICOMENT: for a controlled vasodynamic activation, a pleasant cool-warm effect, that gives a unique sensation of wellness



PANTROFINA™
Remedy

Scalp
Blossom

2501FP_SCSC_04

PANTROFINA™ Remedy

INCI: Propylene Glycol, Undecylenic Acid, Arginine, Salicylic Acid, Aqua
Level of use 0.5-1.2%



PANTROFINA™ Remedy is designed to rebalance the scalp under stressful conditions, promoting homeostasis while addressing dandruff and sensitivity.

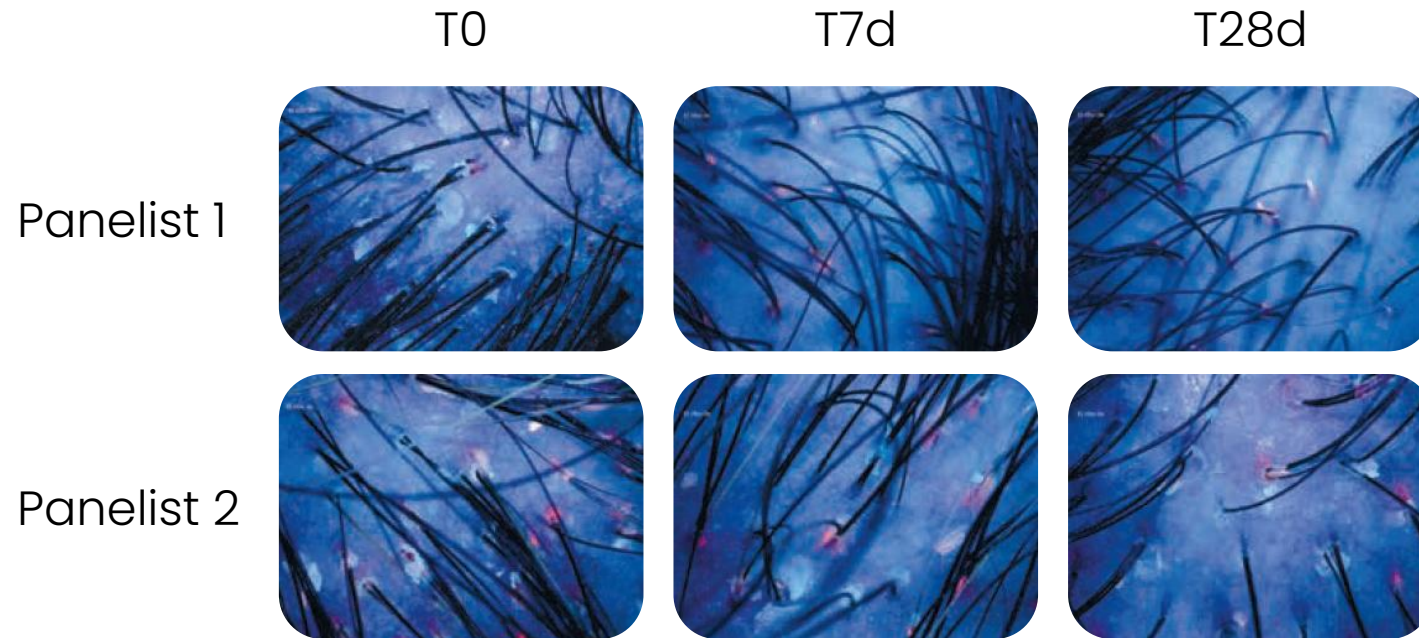
- **Dandruff Control** – provides high effectiveness in reducing dandruff and promoting a healthy scalp.
- **Soothing Relief** – significantly reduces scalp itching, providing comfort and relief.
- **Gentle Care** – suitable for sensitive skin, delivering effective results without irritation.



China
Inventory
Listed

PANTROFINA™ Remedy

Clinical evaluation of anti-dandruff efficacy



Dandruff Improvement

80% of panelists after 7 days

85% of panelists after 28 days

PANTROFINA™ Remedy

Highly efficient in the clinical improvement of the Dandruff condition, only **after 7 days**

HERO INGREDIENT

SCALP ITCHING QUENCHER



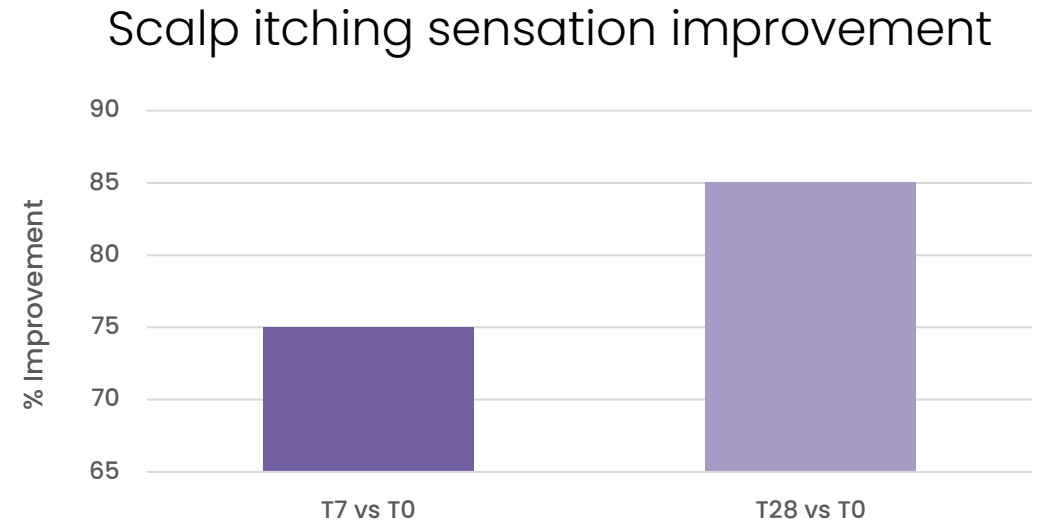
The anti-itching efficacy and skin tolerability were self-evaluated by volunteers in a 4-score value.

Each volunteer was asked to assign a value related to a scalp itching level at T0 after 7 and 28 days using the following scale:

0= No itching 1= Slight itching
2= Moderate itching 3= Severe itching

PANTROFINA™ Remedy

Shows instant and long-term scalp itching sensation reduction of **75%** and **85%**





MIC determination

PANTROFINA™ Remedy

Shows an efficient antifungal activity with $\geq 1\%$ MIC for Malassezia Furfur

		PANTROFINA™ Remedy			
		0.10%	0.50%	1.0%	2.0%
Malassezia Furfur	1	+	+	-	-
	2	+	+	-	-

PANTROFINA™ Remedy

1. Effective active ingredient to fight dandruff and take care of sensitive skin
2. Reduces the dandruff in 80% of volunteers after 7d of treatment and in 85% of volunteers after 28d
3. Reduces the itching sensation in the scalp in most test volunteers
4. Presents high effectiveness in decreasing scalp itching in only 7 days!

STRENGTH

Sharohyal™ Moringa

Inspired by Strength

Strength symbolizes courage, resilience, and inner power. SHAROHYAL™ MORINGA embodies this energy by deeply nourishing the scalp and hair overnight, restoring balance while promoting softness, manageability, and vitality.

Its restorative action strengthens hair from within, supporting resilience against daily stress. Like Strength, it enhances inner fortitude – leaving hair healthier, more balanced, and ready to shine.



SWEET DREAMS RESTORATIVE OIL

2601FP_CALP_05



	TRADE NAME	INCI	%
PHASE A	EMULPHARMA™ ECOTECH MB	Polyglyceryl-3 Cocoate	12
	RESPLANTA® PHYTO-6 ALMOND MB	Almond Oil Polyglyceryl-6 Esters	4
	SORBITAN OLEATE	Sorbitan Oleate	4,5
PHASE B	CAPRYLYL/CAPRYL GLUCOSIDE SOL.	Caprylyl Capryl Glucoside, Water	8,5
	GLYCERIN	Glycerin	2,5
	OCTYLDODECANOL	Octyldodecanol	35
	DICAPRYLYL ETHER	Dicaprylyl Ether	15
	SHAROFEEL DS	Diocetyl dodecyl Succinate	12
PHASE C	PERFUME	Parfum	0,5
	SHAROHYAL™ MORINGA	Glycerin, Sodium Hyaluronate, Moringa Oleifera Extract	2
	PANTROFINA™ GANOTHER	Glycerin, Water, Ganoderma Lucidum (Mushroom) Mycelium Ferment Filtrate	2
	CETRIMONIUM CHLORIDE SOL.	Aqua (Water), Cetrimonium Chloride	2

Sweet Dreams Restorative Oil
2501FP_CALP_06

SWEET DREAMS RESTORATIVE OIL

2601FP_CALP_05

FORMULATION SCIENCE PERSPECTIVE

Must have in formula

Nonionic emulsifier that is oil-soluble and possesses adequate HLB to emulsify upon water contact

Balanced emollient phase to provide an elegant sensory glide

Performance enhancer that can boost emolliency and comfort, helping the cleansing step

A natural derived active specific for hair length

A scalp follicle booster for a complete treatment

Our Ingredients to create it

EMULPHARMA™ ECOTECH MB: PEG-free, derived from coconut and polyglycerols, cold processable and blooming promoter

SHAROFEEEL DS: sophisticated emollient that boost the sensoriality of any oil phase

RESPLANTA® PHYTO-6 ALMOND: water soluble almond oil rich in long chain monounsaturated fatty acids, offering hydrating and refatting properties

SHAROHYAL™ MORINGA: the perfect synergy between a low molecular weight hyaluronic acid and moringa proteins designed to offer a repair treatment for damaged hair

PANTROFINA™ GANOTHER: derived from Ganoderma lucidum mushroom, "the mushroom of immortality". It is an oriental fungus with a long history of use for promoting health and longevity.



**Sweet Dreams
Restorative Oil**
2501FP_CALP_06

SHAROHYAL™ Moringa

INCI: Glycerin, Aqua (Water), Moringa Oleifera Seed Extract, Sodium Hyaluronate
Level of use 0.5-2%



SHAROHYAL™ Moringa delivers repair, protection, and visible improvement for damaged, dry, or brittle hair

Deep Repair - penetrates deeply into the cortex, repairing damage from the inside out for lasting restoration.

Cuticle Protection - shows high binding affinity to the cuticle, shielding it from external stressors and damage.

Hair Moisturization - enhances moisture retention for hydrated, soft, and smooth hair.

Improved Elasticity - restores elasticity, reducing hair breakage.

Enhanced Morphology - optimizes hair structure for a healthier, more uniform appearance.



China
Inventory
Listed



COSMOS
NATURAL



ISO 16128 Natural
Origin Index 0.97

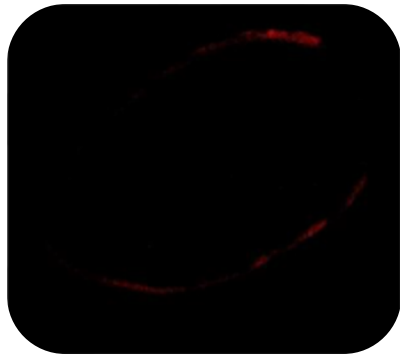


NATRUE
certified

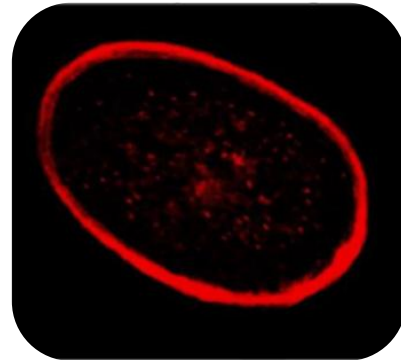


Rapidly
Biodegradable
OECD 301F

Penetration evidence with fluorometric method



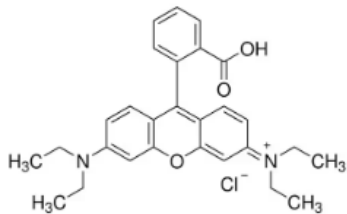
Placebo-fluorescent marker



SHAROHYAL™ Moringa

Fluorescence-marked SHAROHYAL™ Moringa

- Visibly bound to the outside part of the hair Cuticles
- Noticeable penetration inside the hair Cortex
- Penetrates hair and restores its internal structure

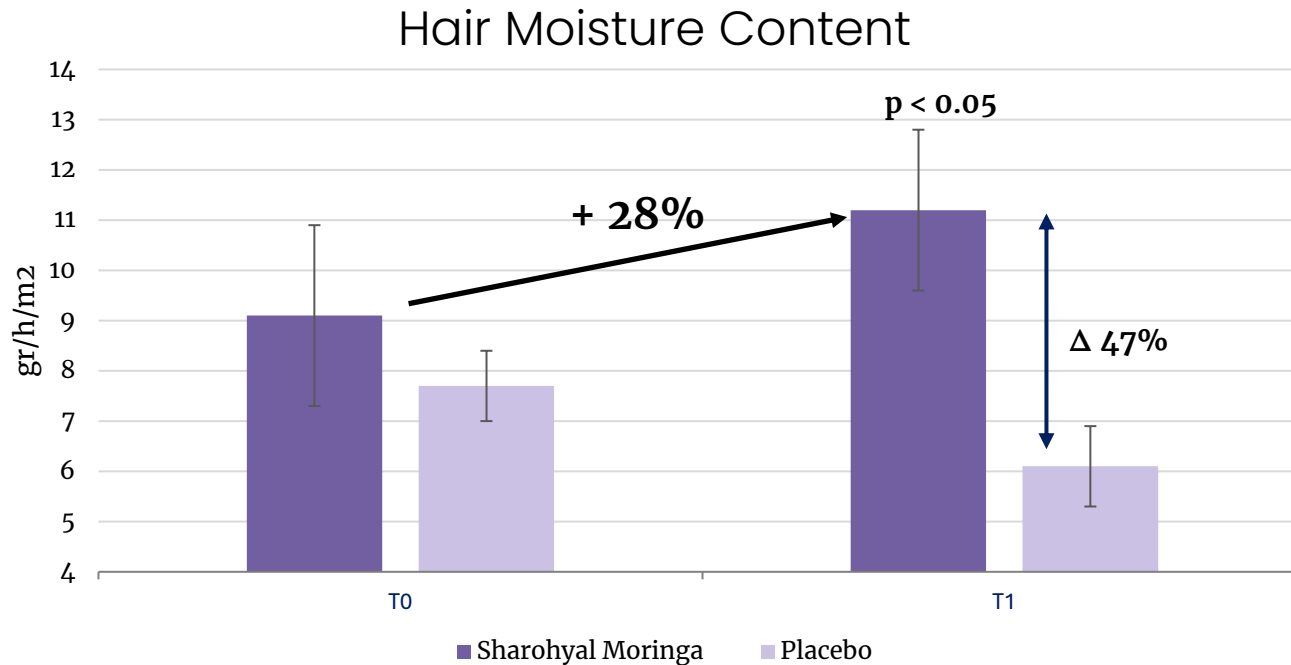


5 human hair fibers treated with **SHAROHYAL™ Moringa 2%** vs. Rhodamine B (Fluorescent marker)

Measurement with Confocal microscope Olympus FV3000



Water Retention Test with Tewameter



Test Method

5 hair locks treated with **2% SHAROHYAL™ Moringa** vs. Placebo

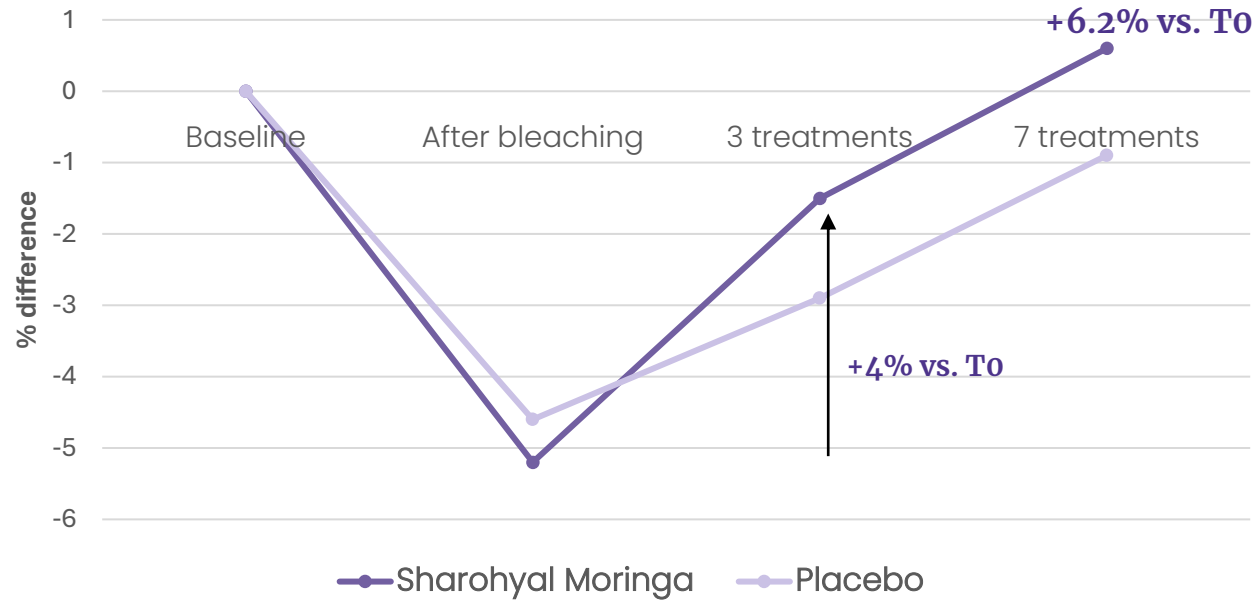
Measurement with Tewameter® TM 300 Courage Khazaka after a single treatment

SHAROHYAL™ Moringa shows a significant moisturization effect vs. T0 attributed to the excellent water retention ability

Restoring Natural Elasticity on damaged hair



Hair Elongation

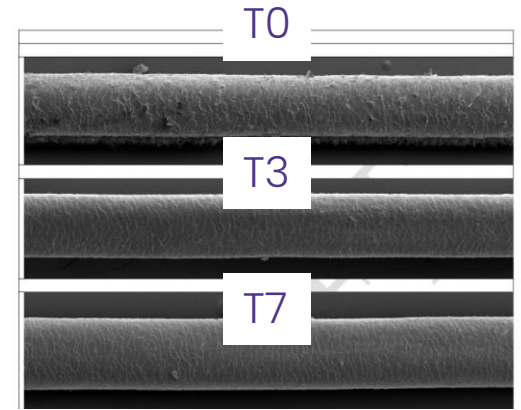


p < 0.05 vs. T0 and Placebo

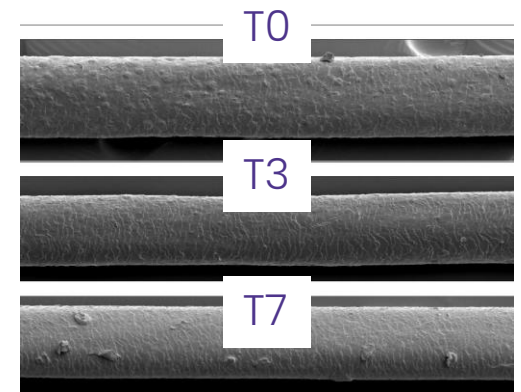
SHAROHYAL™ Moringa

Reverse of bleaching damage with improved cuticle morphology and uniformity

Sharohyal™
Moringa



Placebo



SHAROHYAL™ MORINGA

Repairs from inside and protects
the hair cuticle

Noticeable penetration to the Cortex and high
binding affinity to the Cuticle

Hair moisturization: **28%** increase after a single
treatment

Hair elasticity: **6%** improvement after 7 treatments

Improves hair morphology – SEM evidence



THE MOON

Sharohyal™ Rice

Inspired by The Moon

The Moon symbolizes intuition, cycles, and subtle transformation—guiding the unseen rhythms of renewal and balance. **SHAROHYAL™ RICE** captures this essence by gently cleansing and conditioning the scalp and hair while helping to restore harmony to the hair's natural environment.

Formulated with hydrolyzed rice protein, hyaluronic acid, and glycosaminoglycans, it acts as a natural antistatic conditioner that significantly **reduces electrostatic charge, improves combability, and enhances hair strength and glossiness.**

Like the Moon's calming influence over changing tides, SHAROHYAL™ RICE supports the hair's cyclical journey unveiling balanced, softer, shinier strands and a purified scalp environment with every use.



MOONLIT CLEANSE

2601FP_LOTI_04

	TRADE NAME	INCI	%
PHASE A	WATER	Aqua (Water)	to 100
	SHAROSURF C35 RSPO MB	Aqua (Water), Disodium Cocoyl Glutamate	5
	RESOLVING TGA	Decyl Glucoside, Sodium Methyl Oleoyl Taurate, Aqua, Sodium sesamphoacetate	7
	RESPLANTA® PHYTO BABASSU MB	Babassu Oil Polyglyceryl-4 Esters	3
	SHAROMIX AM 30	Methylpropanediol, Ethylhexylglycerin, Didecyldimonium Chloride, Water	1
	COCAMIDOPROPYL HYDROXYSULTAINE sol.	Aqua (Water), Cocamidopropyl Hydroxysultaine	13
PHASE B	PERFUME	Parfum	0,5
	PANTROFINA™ REMEDY	Propylene Glycol, Undecylenic Acid, Arginine, Salicylic Acid, Aqua (Water)	1
	SHAROHYAL™ RICE	Aqua, Glycerin, Hydrolyzed Glycosaminoglycans, Hydrolyzed Rice Protein, Hyaluronic Acid	3



**Moonlit
Cleanse**

2601FP_LOTI_03

MOONLIT CLEANSE

2601FP_LOTI_04

FORMULATION SCIENCE PERSPECTIVE

Must have in formula

Mild balanced surfactants

Vegetable based nourishing ingredients, that works on scalp and hair

Anti-itching and scaling (dandruff) active to promote scalp wellbeing

Natural derived conditioning ingredient to improve hair gloss and strength

Our Ingredients to create it

RESOLVING TGA and SHAROSURF C35
RSPO MB

RESPLANTA® PHYTO BABASSU MB: a water soluble vegetable oil, that can help to avoid excessive degreasing and boost foam

PANTROFINA™ REMEDY

SHAROHYAL™ RICE



**Moonlit
Cleanse**

2601FP_LOTI_03

SHAROHYAL™ Rice

INCI: Aqua, Glycerin, Hydrolyzed Rice Protein, Hydrolyzed Glycosaminoglycans, Hyaluronic Acid

Level of use 0.5–5%



SHAROHYAL™ Rice offers a premium conditioning solution by leveraging the efficacy of Hyaluronic Acid and Hydrolyzed Rice Proteins. It is ideal for rinse-off formulations and boosts hair shine, strength, and manageability for soft and resilient hair.

Advanced Conditioning – forms a lightweight film enhancing hair's smoothness and manageability.

Improved Combability – reduces hair fragility during combing, minimizing breakage.

Enhanced Gloss and Luminosity – boosts hair's natural shine and radiance.

Strength and Resilience – reinforce the hair structure for improved strength and reduced fragility.



China
Inventory
Listed



COSMOS
NATURAL



NATRUE
Certified

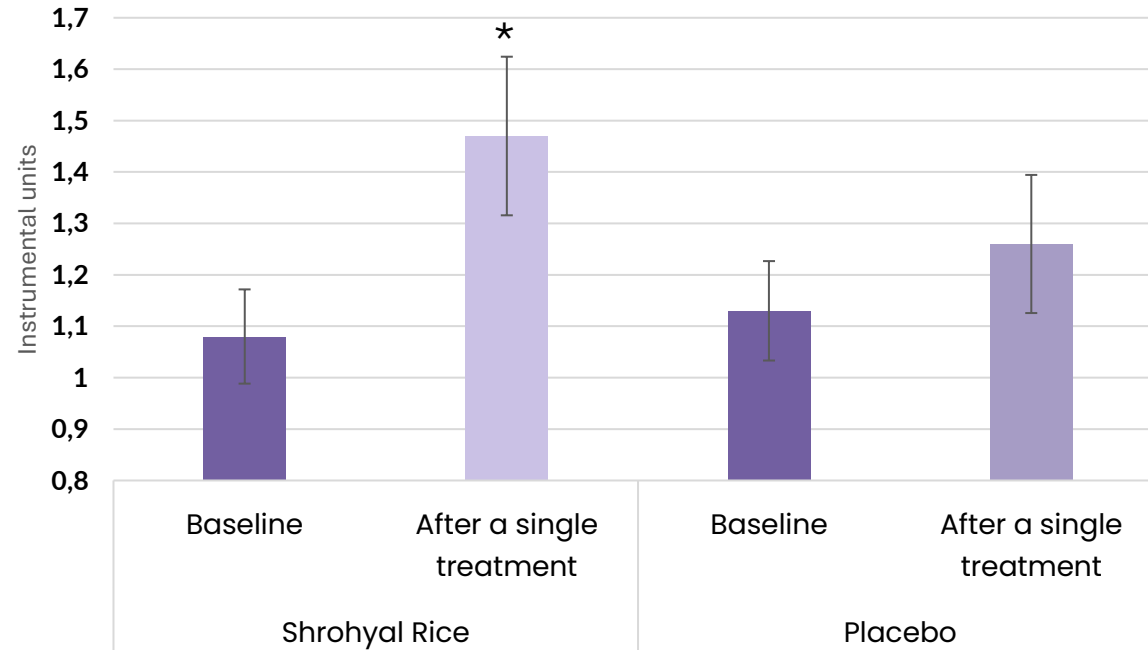


ISO 16128 Natural Origin
Index 1



HALAL

SHAROHYAL™ Rice – hair luminosity



Test Method

10 natural hair tresses treated with **2% SHAROHYAL™ Rice** vs. Placebo conditioner

Treatment protocol: washing with shampoo, applying hair conditioner for 15 minutes, washing and drying in the open air.

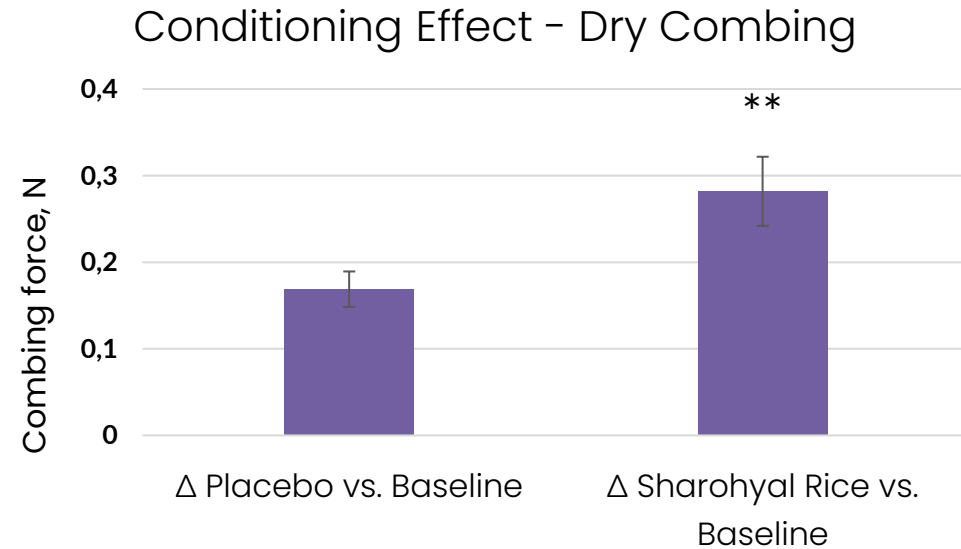
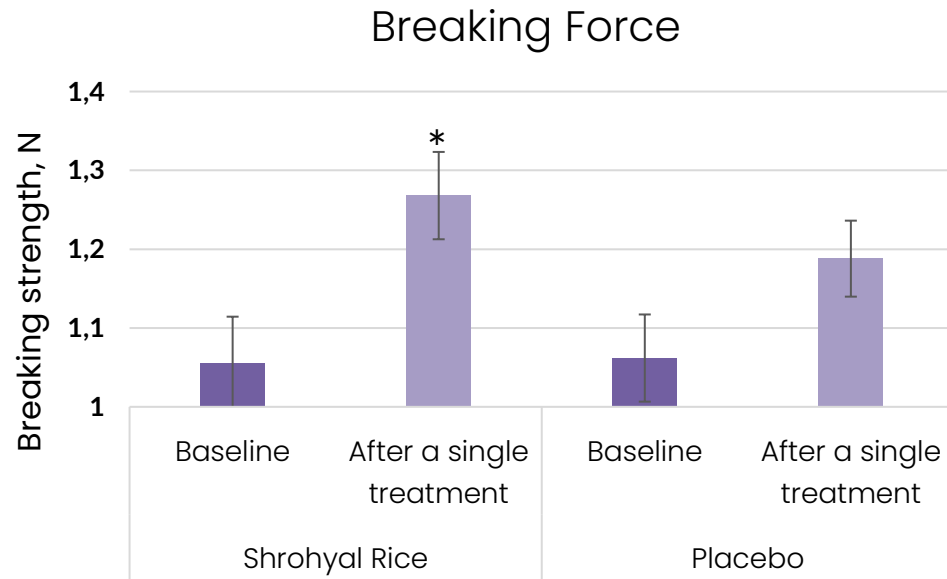
Two measurements – at T0 and after a single treatment

Instrumental measurements: Dynamometer for combability and break force, and Spectro guide for hair gloss.

SHAROHYAL™ Rice significantly improves hair luminosity after a single application by 36%

*- Sharohyal Rice vs. Baseline $p < 0.05$

SHAROHYAL™ Rice – hair fragility and combability



SHAROHYAL™ Rice

reduces hair fragility during combing by **-20%** vs. Baseline

improves the conditioning effect by **+67%** vs. Placebo

*- Sharohyal Rice vs. T0 $p < 0.001$, **- Sharohyal Rice vs. Placebo $p < 0.05$

SHAROHYAL™ RICE

Flawless results after just one treatment

Boosts hair luminosity by **36%**

Reduces hair fragility during combing by **20%**

Enhances conditioning effect by **67%**



TAKE HOME MESSAGE

Hair Care Trends & Targeted Solutions

Hair care is one of the fastest-growing sectors

Trends are shifting from long routines to targeted, high-performance products.

Scalp care is now a key focus driving innovation in active ingredients.



TAKE HOME MESSAGE

Hair Care Trends & Targeted Solutions

Need

Active Ingredient

Key Benefits

Hair Brightness & Conditioning

SHAROHYAL™ Rice

- Boosts hair luminosity by 36%
- Reduces hair fragility during combing by 20%
- Enhances conditioning effect by 67%

Deep Repair & Moisturization

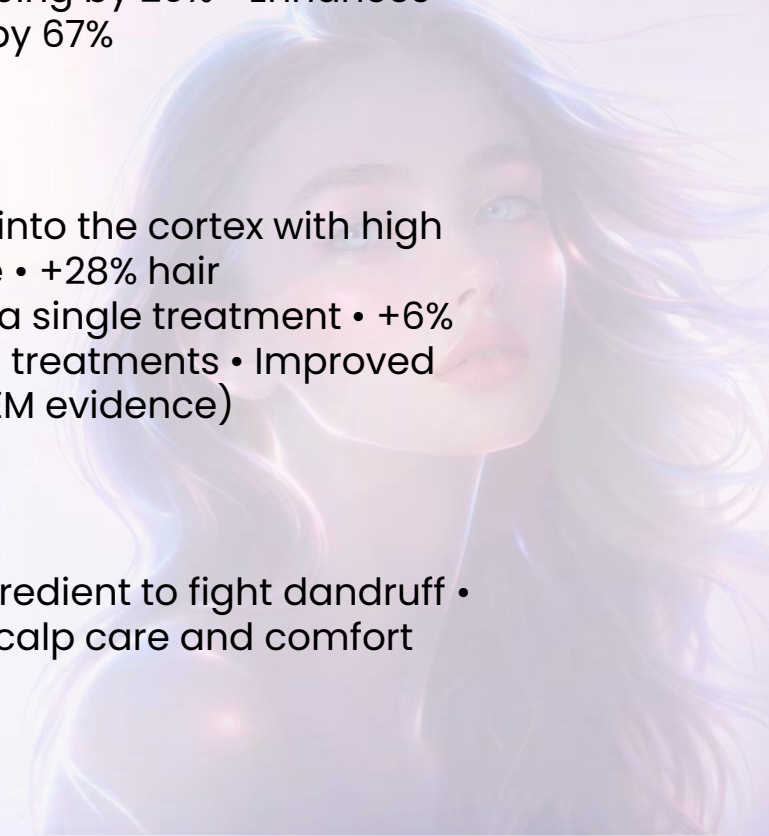
SHAROHYAL™ Moringa

- Penetrates deeply into the cortex with high affinity to the cuticle
- +28% hair moisturization after a single treatment
- +6% hair elasticity after 7 treatments
- Improved hair morphology (SEM evidence)

Scalp Care & Anti-Dandruff

PANTROFINA™ Remedy

- Effective active ingredient to fight dandruff
- Supports sensitive scalp care and comfort




SCALP, REPAIR OR GLOW?

The cards already know. Which one will you choose?





SHARON
PERSONAL CARE

By **eternis** 

Thank you!