

# **Mannequin Head Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Men, Women, Infants & Toddlers), By Application (Makeup Artistry, Wig & Hairpiece Design), By Region & Competition, 2021-2031F**

<https://marketpublishers.com/r/MC7C7396545BEN.html>

Date: January 2026

Pages: 186

Price: US\$ 4,500.00 (Single User License)

ID: MC7C7396545BEN

## **Abstracts**

The Global Mannequin Head Market is projected to expand from a valuation of USD 1041.49 Million in 2025 to USD 1422.22 Million by 2031, registering a CAGR of 5.33%. This market encompasses the commerce of life-sized head models manufactured from materials like fiberglass, PVC, or Styrofoam, often featuring synthetic or human hair for the purposes of retail display and styling instruction. Key drivers fueling this growth include the mandatory nature of practical training within cosmetology education and the increasing necessity for visual merchandising within the fashion and wig industries. As reported by the National Hair & Beauty Federation in October 2024, the United Kingdom's hair and beauty sector expanded to comprise 63,824 businesses, indicating robust demand for professional tools among a growing number of service providers, which underpins global market stability.

However, market growth faces a significant obstacle in the form of escalating costs for high-quality raw materials, particularly human hair, which negatively affects the profitability of producing premium training heads. Volatility in pricing and ethical sourcing restrictions frequently compel educational institutions to restrict their purchasing of these critical training aids. This constraint has the potential to impede volume growth within the premium segment, even though there remains a fundamental demand for practical education resources.

## **Market Driver**

The growth of vocational training and cosmetology infrastructure acts as a vital engine for the volume of the mannequin head market. Because accreditation bodies mandate strict practical hours for licensure, educational facilities are required to continuously acquire durable mannequin heads, allowing students to perfect coloring, cutting, and styling skills prior to working on actual clients. This demand from the educational sector aligns with broader labor trends; the U.S. Bureau of Labor Statistics released 'Employment Projections: 2024-2034' in August 2025, projecting approximately 84,200 annual openings for cosmetologists, hairstylists, and barbers over the decade. This consistent stream of trainees guarantees a recurring replacement cycle for training tools, a trend further bolstered by the sector's overall vitality, as demonstrated by L'Oreal Groupe's '2024 Annual Results' in February 2025, which noted a 5.3% like-for-like sales increase in their Professional Products Division.

Concurrently, increasing global demand for hair extensions and wigs drives the need for display-centric mannequin heads. Elaborate synthetic pieces and premium human hair wigs necessitate specialized head forms for visual merchandising in retail settings and to preserve shape during storage or styling by consumers. This trend is especially evident among major manufacturers who depend on these tools to present products and generate sales. For instance, Henan Rebecca Hair Products Co., Ltd. reported in its 'Semi-Annual Report 2025' in July 2025 that first-half sales reached CNY 597.94 million, highlighting the significant size of the wig manufacturing industry that consumes these display heads. As a result, the market benefits from revenue generated by both aesthetic retail displays and functional educational tools.

## **Market Challenge**

Escalating prices for human hair act as a major financial constraint on the Global Mannequin Head Market, reducing manufacturer profit margins and necessitating price hikes that core customers struggle to afford. Vocational training centers and cosmetology schools generally function with fixed annual budgets that do not easily accommodate inflationary pressures. As the production costs for premium human-hair training heads rise due to expensive raw materials, these educational purchasers are forced to either decrease their overall order quantities or replace high-end models with cheaper synthetic alternatives. This situation directly hampers revenue growth in the premium sector, as manufacturers cannot transfer increased input costs to buyers without losing substantial sales volume.

This economic fragility is exacerbated by the industry's significant dependence on a concentrated supply base for its most essential raw material. Data from The Plastics

Export Promotion Council in March 2024 indicates that India provided roughly 80% to 90% of the global raw material needs for the human hair industry. Such extreme reliance on a single geographic region means that any volatility in export pricing or local collection rates instantly disrupts the global cost structure, hindering mannequin head manufacturers from sustaining the stable pricing required for consistent market expansion.

## **Market Trends**

The market for mannequin heads is being fundamentally transformed by the integration of ethnically diverse hair textures and facial features, driven by mandates from educational bodies for inclusive training curriculums. Manufacturers are increasingly creating models featuring hyper-realistic curl patterns ranging from 3mm to 15mm to replicate kinky and coily hair, moving away from the straight-hair units that traditionally dominated vocational education. This shift is crucial for aligning training tools with the diverse client base cosmetologists will eventually serve, ensuring licensure candidates possess the skills to manage high-texture hair prior to employment. As highlighted by BeautyMatter in the July 2025 article 'Curriculum of Change: How Inclusive Beauty Is Reshaping America's Beauty Industry', 65% of the U.S. population has some type of textured hair, a demographic fact compelling schools to acquire diverse training aids to ensure student competency across all hair types.

At the same time, the market is undergoing a decisive move toward plant-based and biodegradable manufacturing materials to reduce the environmental footprint of disposable Styrofoam heads. Academies and salons are increasingly requesting recyclable or compostable options that support broader 'zero-waste' operational objectives, prompting manufacturers to explore sustainable fibers and bio-foams instead of traditional expanded polystyrene. This evolution addresses the significant amount of non-biodegradable waste produced annually by the beauty industry, which has become a major concern for institutional purchasers. According to the '2024 Sustainability Report' by Green Circle Salons in May 2025, the organization diverted over 11 million pounds of waste from waterways and landfills, emphasizing the urgent industry-wide pressure on suppliers to adopt circular product lifecycles and phase out non-recyclable training tools.

## **Key Market Players**

GenesisDisplay GmbH

Bombay Hair

Simply Manikins

Exalto Professionnel

Sam Villa

Giell Mannequins

Mondo Mannequins

HairArt Int'l Inc.

LA ROSA

Milano Collection Wigs

## **Report Scope**

In this report, the Global Mannequin Head Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Mannequin Head Market, By Type

Men

Women

Infants & Toddlers

### Mannequin Head Market, By Application

Makeup Artistry

Wig & Hairpiece Design

## Mannequin Head Market, By Region

### North America

United States

Canada

Mexico

### Europe

France

United Kingdom

Italy

Germany

Spain

### Asia Pacific

China

India

Japan

Australia

South Korea

### South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Mannequin Head Market.

### **Available Customizations:**

Global Mannequin Head Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL MANNEQUIN HEAD MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Men, Women, Infants & Toddlers)
  - 5.2.2. By Application (Makeup Artistry, Wig & Hairpiece Design)
  - 5.2.3. By Region
  - 5.2.4. By Company (2025)

### 5.3. Market Map

## 6. NORTH AMERICA MANNEQUIN HEAD MARKET OUTLOOK

### 6.1. Market Size & Forecast

#### 6.1.1. By Value

### 6.2. Market Share & Forecast

#### 6.2.1. By Type

#### 6.2.2. By Application

#### 6.2.3. By Country

### 6.3. North America: Country Analysis

#### 6.3.1. United States Mannequin Head Market Outlook

##### 6.3.1.1. Market Size & Forecast

###### 6.3.1.1.1. By Value

##### 6.3.1.2. Market Share & Forecast

###### 6.3.1.2.1. By Type

###### 6.3.1.2.2. By Application

#### 6.3.2. Canada Mannequin Head Market Outlook

##### 6.3.2.1. Market Size & Forecast

###### 6.3.2.1.1. By Value

##### 6.3.2.2. Market Share & Forecast

###### 6.3.2.2.1. By Type

###### 6.3.2.2.2. By Application

#### 6.3.3. Mexico Mannequin Head Market Outlook

##### 6.3.3.1. Market Size & Forecast

###### 6.3.3.1.1. By Value

##### 6.3.3.2. Market Share & Forecast

###### 6.3.3.2.1. By Type

###### 6.3.3.2.2. By Application

## 7. EUROPE MANNEQUIN HEAD MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Application

#### 7.2.3. By Country

### 7.3. Europe: Country Analysis

- 7.3.1. Germany Mannequin Head Market Outlook
  - 7.3.1.1. Market Size & Forecast
    - 7.3.1.1.1. By Value
  - 7.3.1.2. Market Share & Forecast
    - 7.3.1.2.1. By Type
    - 7.3.1.2.2. By Application
- 7.3.2. France Mannequin Head Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Type
    - 7.3.2.2.2. By Application
- 7.3.3. United Kingdom Mannequin Head Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Type
    - 7.3.3.2.2. By Application
- 7.3.4. Italy Mannequin Head Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Application
- 7.3.5. Spain Mannequin Head Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Type
    - 7.3.5.2.2. By Application

## **8. ASIA PACIFIC MANNEQUIN HEAD MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Type
  - 8.2.2. By Application
  - 8.2.3. By Country

- 8.3. Asia Pacific: Country Analysis
  - 8.3.1. China Mannequin Head Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Type
      - 8.3.1.2.2. By Application
  - 8.3.2. India Mannequin Head Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Type
      - 8.3.2.2.2. By Application
  - 8.3.3. Japan Mannequin Head Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Type
      - 8.3.3.2.2. By Application
  - 8.3.4. South Korea Mannequin Head Market Outlook
    - 8.3.4.1. Market Size & Forecast
      - 8.3.4.1.1. By Value
    - 8.3.4.2. Market Share & Forecast
      - 8.3.4.2.1. By Type
      - 8.3.4.2.2. By Application
  - 8.3.5. Australia Mannequin Head Market Outlook
    - 8.3.5.1. Market Size & Forecast
      - 8.3.5.1.1. By Value
    - 8.3.5.2. Market Share & Forecast
      - 8.3.5.2.1. By Type
      - 8.3.5.2.2. By Application

## **9. MIDDLE EAST & AFRICA MANNEQUIN HEAD MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Application

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Mannequin Head Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type
      - 9.3.1.2.2. By Application
  - 9.3.2. UAE Mannequin Head Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type
      - 9.3.2.2.2. By Application
  - 9.3.3. South Africa Mannequin Head Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Type
      - 9.3.3.2.2. By Application

## **10. SOUTH AMERICA MANNEQUIN HEAD MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application
  - 10.2.3. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Mannequin Head Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Application
  - 10.3.2. Colombia Mannequin Head Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value

#### 10.3.2.2. Market Share & Forecast

##### 10.3.2.2.1. By Type

##### 10.3.2.2.2. By Application

#### 10.3.3. Argentina Mannequin Head Market Outlook

##### 10.3.3.1. Market Size & Forecast

##### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

##### 10.3.3.2.1. By Type

##### 10.3.3.2.2. By Application

## 11. MARKET DYNAMICS

### 11.1. Drivers

### 11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

### 12.1. Merger & Acquisition (If Any)

### 12.2. Product Launches (If Any)

### 12.3. Recent Developments

## 13. GLOBAL MANNEQUIN HEAD MARKET: SWOT ANALYSIS

## 14. PORTER'S FIVE FORCES ANALYSIS

### 14.1. Competition in the Industry

### 14.2. Potential of New Entrants

### 14.3. Power of Suppliers

### 14.4. Power of Customers

### 14.5. Threat of Substitute Products

## 15. COMPETITIVE LANDSCAPE

### 15.1. GenesisDisplay GmbH

#### 15.1.1. Business Overview

#### 15.1.2. Products & Services

#### 15.1.3. Recent Developments

#### 15.1.4. Key Personnel

#### 15.1.5. SWOT Analysis

- 15.2. Bombay Hair
- 15.3. Simply Manikins
- 15.4. Exalto Professionnel
- 15.5. Sam Villa
- 15.6. Giell Mannequins
- 15.7. Mondo Mannequins
- 15.8. HairArt Int'l Inc.
- 15.9. LA ROSA
- 15.10. Milano Collection Wigs

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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