

Hair and Scalp Care Market Size, Share & Growth Report, H2-2026: Industry Outlook By Product Type, By Concern, By Hair Type, By Price Tier, By End-Use, By Distribution Channel, Companies and Countries to 2032

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Abstracts

The global Hair and Scalp Care Market is estimated to generate \$68.9 Billion in 2026. Further, between 2026 and 2032, the market size is forecast to grow at a CAGR of 5.9% to reach \$97.2 Billion in 2032. This Hair and Scalp Care report provides a comprehensive analysis across By Product Type (Shampoos, Conditioners, Hair Oils, Hair Serums, Masks and Treatments, Hair Coloring Products, Hair Styling Products), By Concern (Dry and Damaged Hair, Dandruff and Flaky Scalp, Oily and Greasy Scalp, Sensitive and Irritated Scalp, Hair Loss and Thinning, Glossy Hair), By Hair Type (Straight, Wavy, Curly, Coily), By Price Tier (Mass, Mid-Tier, Premium), By End-Use (Women, Men), By Distribution Channel (Supermarkets and Hypermarkets, Specialty Beauty Stores, Pharmacies and Drugstores, Online), across 5 geographic regions, and 22 countries.

Growing Consumer Awareness of Scalp Health and Preventive Hair Care

The global hair and scalp care industry continues to expand as consumers increasingly recognize scalp health as an essential component of overall hair wellness. Demand is rising for products that address concerns such as dandruff, dryness, hair thinning, excess oil, scalp sensitivity, and hair damage through targeted treatment solutions. Consumers are seeking comprehensive routines that combine cleansing, nourishment, and long-term scalp maintenance while favoring products formulated with scientifically validated and naturally derived ingredients. The increasing influence of dermatologists, beauty professionals, and digital beauty platforms is also encouraging greater adoption

of specialized hair and scalp care products across premium and mass-market segments.

Product Innovation and Advanced Hair Care Formulations

Manufacturers are investing in scalp microbiome research, botanical actives, and advanced formulation technologies to improve hair health and treatment effectiveness. L'Oréal Professionnel continues expanding its scalp care portfolio with professionally formulated products designed to address diverse scalp conditions while supporting healthy hair growth. Kérastase is strengthening its premium hair care range through scalp-focused formulations incorporating targeted active ingredients and personalized treatment approaches. Meanwhile, Head & Shoulders, a brand of Procter & Gamble, continues developing advanced anti-dandruff and scalp care solutions that combine clinically proven ingredients with improved cosmetic performance. Manufacturers are also introducing sulfate-free shampoos, scalp serums, exfoliating treatments, and leave-in formulations to diversify product offerings.

Increasing Emphasis on Personalized Hair Care and Clean Beauty Formulations

Manufacturers are increasingly developing personalized hair and scalp care solutions based on individual hair types, scalp conditions, and lifestyle preferences. Product portfolios are expanding with microbiome-friendly formulations, vegan ingredients, silicone-free products, refillable packaging, and multifunctional scalp treatments that combine cleansing, hydration, and nourishment. Companies are also incorporating AI-powered hair diagnostics, digital consultation platforms, and customized product recommendations to enhance consumer engagement and treatment selection. Continued investment in ingredient transparency, premium formulations, and science-backed scalp care solutions is influencing product development across the global hair and scalp care industry.

Shifting Consumer Expectations and Industry Transformation

Young and adult consumers across markets are increasingly scrutinizing products beyond price and brand, seeking greater visibility into ingredients or materials, their origin, manufacturing location, quality, sourcing practices, and environmental attributes. This is increasing the importance of ingredient lists, nutrition labeling, allergen declarations, certifications, sourcing information and other product claims, while also raising the bar for transparency and substantiation.

In addition, the industry is being reshaped by advances in AI, ingredient and formulation technologies, automation, digital commerce, packaging technology and data analytics, creating new opportunities to accelerate product development, improve product quality and optimize operations. However, these capabilities require higher capital commitments, particularly as companies invest in store expansion and refurbishment, automation, AI-enabled systems, digital infrastructure and other productivity-enhancing technologies.

Competitive dynamics are also shifting as private-label and disruptor brands raise value expectations across selected price points, pushing established players to sharpen their entry, core and premium propositions. Private-label expansion, adjacent-category opportunities, M&A and AI are consequently creating new avenues for growth for manufacturers, suppliers and other industry participants across both developed and developing markets.

Impact of Tariffs and Inflation Rates on Hair and Scalp Care Markets and Companies

Tariffs and elevated inflation are directly reshaping the cost structure and pricing strategies of Food & Beverages and Consumer Goods companies. The impact is particularly visible in imported ingredients and raw materials, packaging materials, energy, transportation, and other internationally sourced inputs, while higher consumer prices are increasing pressure on household purchasing decisions. The IMF WEO Data 2026 projects global headline inflation at 4.7% in 2026, while the continued use of tariffs and other trade measures is increasing uncertainty around sourcing and cross-border costs.

The report quantifies the impact of tariff changes and inflation on the market by analyzing country-level inflation trends, tariff exposure, import dependence, input-cost movements and pricing conditions, and assesses their implications for market volumes, revenues and margins.

Key Value-Creating Activities and Participants Across the Hair and Scalp Care Industry Value Chain

Hair and Scalp Care value chains are becoming more cost-sensitive and closely integrated, with changes in input prices, sourcing concentration, production efficiency, packaging costs, logistics and channel economics directly influencing margins and competitive positioning at each stage.

The report maps the value chain from upstream suppliers to end-use channels, identifies the principal participants and value-adding activities at each stage, and assesses the relative importance of procurement, manufacturing, packaging, logistics, distribution and retail in the forecast period.

Hair and Scalp Care Pricing analysis- How Input Costs, Competition and Positioning Influence Hair and Scalp Care Market Pricing

Pricing analysis in the report establishes how prices differ across products, segments, countries and channels and what is driving those differences. The report provides historical and current price benchmarks, country-level and regional comparisons, product-level pricing, and an assessment of the principal factors influencing price movements.

Five forces analysis- How Competitive Forces Are Shaping the Hair and Scalp Care Industry

The chapter in the Hair and Scalp Care report evaluates competitive rivalry, threat of new entrants, bargaining power of suppliers, bargaining power of buyers, and threat of substitutes, with each force assessed against the market's actual operating conditions. It analyzes market factors including fragmentation, product differentiation, manufacturing and distribution requirements, switching costs, supplier concentration, raw-material availability, retailer purchasing power, and the ability of consumers to substitute between brands. The report also examines how e-commerce and marketplaces are lowering certain barriers to market access while intensifying price transparency, and how established distribution networks, brand recognition, scale and customer relationships continue to protect incumbents across categories.

Critical Success Factors- Key Factors Determining Competitive Success in the Hair and Scalp Care Industry

The report identifies the critical success factors that fuel growth in the Hair and Scalp Care market, in addition to market trends and company capabilities. The Hair and Scalp Care report evaluates critical success factors against the market's competitive environment and assesses how leading participants are strengthening them. Further, the chapter identifies the factors with strongest influence on market-share retention, customer loyalty, pricing power, operating performance, and long-term competitive differentiation.

Segmentation analysis- How Demand Is Distributed Across Key Segments of the Hair and Scalp Care Market

The report analyzes the global and regional markets across key types, applications, and other segments from 2021 to 2025. Further, forecasts are provided from 2026 to 2032. Key segments included in the study are By Product Type (Shampoos, Conditioners, Hair Oils, Hair Serums, Masks and Treatments, Hair Coloring Products, Hair Styling Products), By Concern (Dry and Damaged Hair, Dandruff and Flaky Scalp, Oily and Greasy Scalp, Sensitive and Irritated Scalp, Hair Loss and Thinning, Glossy Hair), By Hair Type (Straight, Wavy, Curly, Coily), By Price Tier (Mass, Mid-Tier, Premium), By End-Use (Women, Men), By Distribution Channel (Supermarkets and Hypermarkets, Specialty Beauty Stores, Pharmacies and Drugstores, Online).

US Hair and Scalp Care Market - Strong Consumer Spending, Private-Label Expansion and Premium Product Demand

The US Hair and Scalp Care companies are focusing on value positioning, distribution strength, product differentiation, and operating efficiency as private-label products gain ground against national brands. The US store-brand sales reached \$282.8 billion in 2025, growing 3.3% versus 1.2% for national brands, while store brands reached a record 21.3% dollar share and 23.5% unit share according to the Private Label Manufacturers Association. The report provides the US Hair and Scalp Care market size outlook from 2021 to 2032 and the key factors shaping the market along with key strategies adopted by leading companies.

Canada Hair and Scalp Care Market - Affordability, Retail Concentration and Supply-Chain Resilience Shape Market Growth

Over the past two years, Canadian companies have been focusing on value, supply-chain resilience and manufacturing efficiency to overcome trade and cost pressures. Retail demand also remained firm, with food and beverage retail sales increasing 4.4% year-on-year in December 2025, led by packaged dry foods, fresh meat and poultry, and snacks, according to Statistics Canada. The report identifies competitive pricing and product value, retailer access, diversified sourcing, productivity, brand positioning, and portfolio innovation as key success factors across the Canadian Hair and Scalp Care value chain.

Mexico Hair and Scalp Care Market- Rising Consumption, Manufacturing

Expansion and Export Integration Drive Market Development

Mexico's Hair and Scalp Care market is supported by a large domestic consumer base, established manufacturing capabilities, and strong export integration, while pricing remains an important consideration for consumers and manufacturers. The INEGI reported that the consumer prices for food, beverages and tobacco increased 5.13% year-on-year in May 2026, compared with 3.94% for overall consumer prices, keeping affordability and price management central to category performance. Leading companies are focusing on domestic manufacturing scale, ingredient availability, export competitiveness, product differentiation, efficient sourcing and supply-chain execution to gain profit margins.

Germany Hair and Scalp Care Market- Private-Label Strength, Price Sensitivity and Manufacturing Efficiency Shape Competition

Value-for-money, private-label competitiveness, efficient sourcing, and cost control are central to market performance and continue to shape the market outlook. German food prices remained structurally above their pre-inflation baseline: the food and non-alcoholic beverages CPI reached 136.2 in 2025 (2020=100), compared with 121.9 for the overall CPI, although annual food inflation moderated to 2.0% in 2025. The market is also being influenced by Germany's policy push toward healthier eating and greater development of alternative protein products, creating additional opportunities for reformulation and product innovation.

France Hair and Scalp Care Market- Premium Food Culture, Retail Transformation and Selective Consumer Spending Drive Demand

France's Hair and Scalp Care market is being shaped by moderating food inflation, cautious household consumption and a shift in retail demand toward value and specialized formats. Household final consumption expenditure increased only 0.4% in volume in 2025, while household purchasing power declined 0.4%, keeping affordability and price-value positioning important despite the easing of inflation. Hair and Scalp Care companies operating in France are balancing value-oriented pricing with quality and differentiation, strengthening supermarket and alternative-format distribution, managing procurement and supply-chain costs, and responding to increasingly selective household spending.

UK Hair and Scalp Care Market- Import Dependence, Retail Concentration and Product Portfolio Expansion Influence Market Growth

The UK Hair and Scalp Care market is strongly influenced by import dependence, household affordability, and retail concentration. Consumer expenditure on food and alcoholic drinks reached ?303.3 billion in real terms in 2025, up 1.1%, with spending on food and drink eaten outside the home increasing 2.3% to ?137.7 billion, while household food expenditure was broadly flat. The structure of the industry also favors companies able to operate efficiently at scale: approximately 98.8% of UK food and drink manufacturing businesses are SMEs, creating a large and fragmented supplier base alongside major manufacturers and retailers. Over the forecast period, competitive pricing, procurement efficiency, product differentiation, retailer and foodservice relationships, import management and the ability to respond remain key success factors.

Spain Hair and Scalp Care Market- Household Consumption, Tourism and Export-Oriented Manufacturing Support Demand

Spain's Hair and Scalp Care market is supported by strong household food expenditure, a large tourism-driven consumption base and a highly export-oriented food industry, although consumers remain sensitive to price increases. Tourism provides an additional demand channel: international tourists spent €11.7 billion in Spain in April 2026 alone, up 7.4% year-on-year, including €1.99 billion on food and drinks, up 6.8%. Spain's food industry also reached a record level of exports in 2025, reinforcing its importance as an export manufacturing base and exposing producers to international trade conditions and supply-chain developments.

Italy Hair and Scalp Care Market- Product Quality, Heritage and Export Competitiveness Remain Key Market Drivers

Italy's consumption structure favors companies capable of maintaining value across differentiated price points: household consumption expenditure averaged €2,738 per month in 2023, up 4.3% from 2022, although the increase reflected both higher spending and price effects. Italy's large manufacturing and export base supports demand for products with strong quality, provenance, and differentiation, particularly where Italian origin provides a competitive advantage. Companies that can combine Italy's established food-manufacturing capabilities with tighter cost control and differentiated products are better positioned to navigate slower domestic consumption and renewed price pressure.

China Hair and Scalp Care Market- Digital Commerce, Brand Trust and Selective

Consumer Spending Reshape Demand

China's Hair and Scalp Care markets are being shaped by large-scale domestic consumption, rapid online retail expansion, increasingly selective spending and a widening performance gap between categories. Total retail sales of consumer goods reached RMB 50.1 trillion in 2025, up 3.7%, significantly outperforming beverages at 1.0%. Online retail is particularly important: physical-goods online sales reached RMB 13.1 trillion, representing 26.1% of total consumer-goods retail sales, while online sales of food increased 14.5% according to the National Bureau of Statistics of China. Established brands retain an advantage where consumers prioritize familiarity and brand authority, while the rapid expansion of online food sales creates opportunities for digitally native brands and manufacturers capable of using data, AI, and platform ecosystems.

India Hair and Scalp Care Market- Rising Consumption, Increasing Investment and Expanding Distribution Create Growth Opportunities

India's Hair and Scalp Care market is being supported by rising household consumption, a large and increasingly diversified consumer base, expansion of food processing and continued investment in formal food manufacturing. India's rural monthly per-capita consumption expenditure reached ₹4,122 in 2023–24, up from ₹3,773 in 2022–23, while urban MPCE increased to ₹6,996, highlighting the continued expansion of household purchasing capacity across both rural and urban markets. The supply side is also becoming more organized and processing-intensive. Digital commerce and AI-enabled consumer engagement are also becoming increasingly relevant, particularly as Indian consumers adopt digital tools across product discovery and purchasing.

Japan Hair and Scalp Care Market- Aging Consumers, Household Price Sensitivity and Digital Purchasing Reshape the Market

Japan's Hair and Scalp Care markets are being shaped by high food expenditure, renewed price pressure and increasingly cautious real household consumption, alongside a structurally mature consumer base. Price pressure has also remained visible in 2026, with Japan's headline CPI increasing 1.5% year-on-year in May 2026, while core inflation excluding fresh food increased 1.4%. Meanwhile, online purchasing remains an important route to consumers: 55.3% of two-or-more-person households used online shopping in May 2026, with food contributing materially to the increase in online-shopping expenditure. Companies also need to manage smaller household sizes and differing consumption patterns by age, while maintaining strong product

differentiation in a mature market where incremental volume growth is more difficult to achieve.

Brazil Hair and Scalp Care Market- Strong Domestic Consumption and Export-Oriented Manufacturing Drive Growth

Brazil's Hair and Scalp Care market is supported by a large domestic consumption base, a highly integrated agricultural and food-processing sector, and exceptional export competitiveness, while renewed food-price pressure is keeping affordability important. The country's food and beverage industry generated R\$1.388 trillion in revenue in 2025, equivalent to 10.9% of national GDP, with domestic sales reaching R\$1.02 trillion; retail accounted for R\$732 billion and foodservice R\$287.9 billion. Real industry sales increased 2.2%, while companies invested R\$41.3 billion, up 6.8%, including R\$26.7 billion in innovation, plant modernization and new technologies.

Middle East Africa Hair and Scalp Care Market- Import Dependence and Value-Added Products Gaining Steady Demand Growth

The Middle East Hair and Scalp Care markets are being shaped by high dependence on food imports, food-security investment, urbanization, tourism, premium retail and increasingly selective consumer spending, with conditions differing substantially between Gulf markets and the wider region. The GCC recorded overall inflation of only 1.8% in 2025, while food and beverage prices increased 1.2%, indicating relatively contained consumer-price pressure compared with many global markets. Across the region, this combination of import exposure and localization is increasing the importance of supplier diversification, local production, inventory management, and efficient logistics, while strong tourism, hospitality, and modern retail ecosystems are supporting demand for differentiated, convenience-oriented, and premium products.

Hair and Scalp Care Competitive Landscape

The Hair and Scalp Care competitive landscape is becoming more fragmented as established multinational brands compete simultaneously with private-label products, regional manufacturers, digitally native brands and category-focused disruptors. Competitive advantage is increasingly determined by the ability to balance price, product quality, innovation, distribution reach and speed of response rather than by brand scale alone. The report provides detailed analysis of leading companies including business profile, SWOT analysis, products and services, and financial profiles of L'Oréal S.A., Unilever, The Procter & Gamble Company, Henkel AG & Co. KGaA, Kao

Corporation, Shiseido Company, The Est?e Lauder Companies, Johnson & Johnson, Amway Corp., Revlon.

Hair and Scalp Care Market Segmentation

By Product Type

Shampoos

Conditioners

Hair Oils

Hair Serums

Masks and Treatments

Hair Coloring Products

Hair Styling Products

By Concern

Dry and Damaged Hair

Dandruff and Flaky Scalp

Oily and Greasy Scalp

Sensitive and Irritated Scalp

Hair Loss and Thinning

Glossy Hair

By Hair Type

Straight

Wavy

Curly

Coily

By Price Tier

Mass

Mid-Tier

Premium

By End-Use

Women

Men

By Distribution Channel

Supermarkets and Hypermarkets

Specialty Beauty Stores

Pharmacies and Drugstores

Online

Geographical Coverage

North America (US, Canada, Mexico)

Europe (Germany, UK, Spain, France, Italy, Russia, Rest of Europe)

Asia Pacific (China, India, Japan, South Korea, Southeast Asia, Rest of APAC)

Latin America (Brazil, Argentina, Rest of South and Central America)

Middle East and Africa (Saudi Arabia, UAE, MENA, South Africa, Sub-Saharan Africa)

Leading Companies in Hair and Scalp Care Industry

L'Oréal S.A.

Unilever

The Procter & Gamble Company

Henkel AG & Co. KGaA

Kao Corporation

Shiseido Company

The Estée Lauder Companies

Johnson & Johnson

Amway Corp.

Revlon

Frequently Asked Questions

1. What is the current size of the Hair and Scalp Care market?

The Hair and Scalp Care market is estimated at US\$68.9 Billion in 2026, based on the report's market sizing methodology. Demand is supported by new product launches, while competition from local labels is influencing near-term market performance. The market is expected to reach US\$97.2 Billion by 2032, reflecting the investment expansion of leading companies.

2. How fast is the Hair and Scalp Care market expected to grow through the forecast period?

The Hair and Scalp Care market is projected to expand at a 5.9% CAGR between 2026 and 2032, with growth concentrated in Asia Pacific.

3. Which segment currently accounts for the largest share of the Hair and Scalp Care market?

The report analyzes the report across By Product Type (Shampoos, Conditioners, Hair Oils, Hair Serums, Masks and Treatments, Hair Coloring Products, Hair Styling Products), By Concern (Dry and Damaged Hair, Dandruff and Flaky Scalp, Oily and Greasy Scalp, Sensitive and Irritated Scalp, Hair Loss and Thinning, Glossy Hair), By Hair Type (Straight, Wavy, Curly, Coily), By Price Tier (Mass, Mid-Tier, Premium), By End-Use (Women, Men), By Distribution Channel (Supermarkets and Hypermarkets, Specialty Beauty Stores, Pharmacies and Drugstores, Online).

4. Which regions are generating the largest demand for Hair and Scalp Care products?

Differences in consumer preferences, pricing, regulation and distribution infrastructure continue to create significant variations in market performance across regions. Asia Pacific is the fastest growing market driven by China, India, Southeast Asia, and other emerging markets.

5. Which companies are leading the Hair and Scalp Care market?

The Hair and Scalp Care market includes major participants such as L'Oréal S.A., Unilever, The Procter & Gamble Company, Henkel AG & Co. KGaA, Kao Corporation, Shiseido Company, The Estée Lauder Companies, Johnson & Johnson, Amway Corp., Revlon. Leading companies compete through product portfolio, distribution, technology, while recent competitive activity includes M&A, product launches, capacity expansion, and geographic expansion. Market leadership varies significantly by product category and geography.

Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2032
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Hair and Scalp Care Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Hair and Scalp Care Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010-2030
 - 1.5.2. Population Forecast by Country, 2010-2030
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL HAIR AND SCALP CARE MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2032

- 3.1. An Introduction to Global Hair and Scalp Care Markets in 2026
- 3.2. Global Historic and Forecast Hair and Scalp Care Market Size Outlook, USD Million, 2021-2032
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2032
- 3.4. Market Dynamics
 - 3.4.1. Key Hair and Scalp Care Market Driving Forces and Their Impact on Market

Outlook

- 3.4.2. Short and Long-Term Trends and Insights Shaping the Future
- 3.4.3. Potential Hair and Scalp Care Market Opportunities for Industry Stakeholders
- 3.4.4. Potential Challenges across Hair and Scalp Care Value Chain

CHAPTER 4- HAIR AND SCALP CARE MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

- 4.1. Porter's Five Forces Analysis
 - 4.1.1. Bargaining Power of Buyers
 - 4.1.2. Bargaining Power of Suppliers
 - 4.1.3. Threat of Substitutes
 - 4.1.4. Threat of New Entrants
 - 4.1.5. Intensity of Competitive Rivalry
 - 4.1.6. Market Attractiveness Analysis by Segment
 - 4.1.7. Market Attractiveness Analysis by Country
- 4.2. Competitive Landscape
 - 4.2.1 Product Analysis of Leading Hair and Scalp Care Companies
 - 4.2.2 Recent Strategic Developments
 - 4.2.3 Mergers, Acquisitions, and Partnerships
 - 4.2.4 Key Success Factors
- 4.3. Value Chain Analysis
 - 4.3.1. Key Value Chain Segments
 - 4.3.2. Dominant players by value-chain stage
- 4.4. SWOT Analysis
 - 4.4.1. Key Strengths and Opportunities
 - 4.4.2. Major Weaknesses and Threats
- 4.5 Technology Roadmap

CHAPTER 5- HAIR AND SCALP CARE MARKET OUTLOOK BY SEGMENTS

- 5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2032
 - 5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2032
 - 5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2032
- By Product Type
- Shampoos
 - Conditioners
 - Hair Oils
 - Hair Serums

Masks and Treatments
Hair Coloring Products
Hair Styling Products
By Concern
Dry and Damaged Hair
Dandruff and Flaky Scalp
Oily and Greasy Scalp
Sensitive and Irritated Scalp
Hair Loss and Thinning
Glossy Hair
By Hair Type
Straight
Wavy
Curly
Coily
By Price Tier
Mass
Mid-Tier
Premium
By End-Use
Women
Men
By Distribution Channel
Supermarkets and Hypermarkets
Specialty Beauty Stores
Pharmacies and Drugstores
Online

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

- 6.1. Base Case Scenario
 - 6.1.1. Definitions and Insights
 - 6.1.2. Market Size Outlook to 2032
- 6.2. Low Growth Case Scenario
 - 6.2.1. Definitions and Insights
 - 6.2.2. Market Size Outlook to 2032
- 6.3. High Growth Case Scenario
 - 6.3.1. Definitions and Insights
 - 6.3.2. Market Size Outlook to 2032

CHAPTER 7- NORTH AMERICA HAIR AND SCALP CARE MARKET SIZE ANALYSIS AND OUTLOOK

- 7.1. North America Hair and Scalp Care Market Overview
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Hair and Scalp Care Market Trends and Growth Opportunities to 2032
- 7.5. North America Hair and Scalp Care Market Size Outlook by Type
- 7.6. North America Hair and Scalp Care Market Size Outlook by Application
- 7.7. North America Hair and Scalp Care Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 7.8.3. Key Market Drivers and Industry Developments in the US Hair and Scalp Care Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Hair and Scalp Care Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Hair and Scalp Care Companies

CHAPTER 8- EUROPE HAIR AND SCALP CARE MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Hair and Scalp Care Market Overview
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Hair and Scalp Care Market Trends and Growth Opportunities to
- 8.5. Europe Hair and Scalp Care Market Size Outlook by Type
- 8.6. Europe Hair and Scalp Care Market Size Outlook by Application
- 8.7. Europe Hair and Scalp Care Market Size Outlook by Country
- 8.8. Germany

- 8.8.1. Key Statistics
- 8.8.2. Germany Hair and Scalp Care Market Size Outlook, 2021- 2032
- 8.8.3. Key Market Drivers and Industry Developments in Germany Hair and Scalp Care Companies
- 8.9. France
 - 8.9.1. Key Statistics
 - 8.9.2. France Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 8.9.3. Key Market Drivers and Industry Developments in France Hair and Scalp Care Companies
- 8.10. United Kingdom
 - 8.10.1. Key Statistics
 - 8.10.2. United Kingdom Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 8.10.3. Key Market Drivers and Industry Developments in the UK Hair and Scalp Care Companies
- 8.11. Spain
 - 8.11.1. Key Statistics
 - 8.11.2. Spain Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 8.11.3. Key Market Drivers and Industry Developments in Spain Hair and Scalp Care Companies
- 8.12. Italy
 - 8.12.1. Key Statistics
 - 8.12.2. Italy Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 8.12.3. Key Market Drivers and Industry Developments in Italy Hair and Scalp Care Companies
- 8.13. Rest of Europe
 - 8.13.1. Key Statistics
 - 8.13.2. Rest of Europe Hair and Scalp Care Market Size Outlook, 2021- 2032
 - 8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Hair and Scalp Care Companies

CHAPTER 9- ASIA PACIFIC HAIR AND SCALP CARE MARKET SIZE ANALYSIS AND OUTLOOK

- 9.1. Asia Pacific Hair and Scalp Care Market Overview
- 9.2. Leading Companies Operating in Asia Pacific
- 9.3. Key Industry Statistics, 2026
- 9.4. Asia Pacific Hair and Scalp Care Market Trends and Growth Opportunities to
- 9.5. Asia Pacific Hair and Scalp Care Market Size Outlook by Type
- 9.6. Asia Pacific Hair and Scalp Care Market Size Outlook by Application

9.7. Asia Pacific Hair and Scalp Care Market Size Outlook by Country

9.8. China

9.8.1. Key Statistics

9.8.2. China Hair and Scalp Care Market Size Outlook, 2021- 2032

9.8.3. Key Market Drivers and Industry Developments in China Hair and Scalp Care Companies

9.9. Japan

9.9.1. Key Statistics

9.9.2. Japan Hair and Scalp Care Market Size Outlook, 2021- 2032

9.9.3. Key Market Drivers and Industry Developments in Japan Hair and Scalp Care Companies

9.10. India

9.10.1. Key Statistics

9.10.2. India Hair and Scalp Care Market Size Outlook, 2021- 2032

9.10.3. Key Market Drivers and Industry Developments in India Hair and Scalp Care Companies

9.11. South Korea

9.11.1. Key Statistics

9.11.2. South Korea Hair and Scalp Care Market Size Outlook, 2021- 2032

9.11.3. Key Market Drivers and Industry Developments in South Korea Hair and Scalp Care Companies

9.12. Australia

9.12.1. Key Statistics

9.12.2. Australia Hair and Scalp Care Market Size Outlook, 2021- 2032

9.12.3. Key Market Drivers and Industry Developments in Australia Hair and Scalp Care Companies

9.13. Southeast Asia

9.13.1. Key Statistics

9.13.2. Southeast Asia Hair and Scalp Care Market Size Outlook, 2021- 2032

9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Hair and Scalp Care Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA HAIR AND SCALP CARE MARKET SIZE ANALYSIS AND OUTLOOK

10.1. South and Central America Hair and Scalp Care Market Overview

10.2. Leading Companies Operating in South and Central America

10.3. Key Industry Statistics, 2026

10.4. South and Central America Hair and Scalp Care Market Trends and Growth

Opportunities to

10.5. South and Central America Hair and Scalp Care Market Size Outlook by Type

10.6. South and Central America Hair and Scalp Care Market Size Outlook by Application

10.7. South and Central America Hair and Scalp Care Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

10.8.2. Brazil Hair and Scalp Care Market Size Outlook, 2021- 2032

10.8.3. Key Market Drivers and Industry Developments in Brazil Hair and Scalp Care Companies

10.9. Argentina

10.9.1. Key Statistics

10.9.2. Argentina Hair and Scalp Care Market Size Outlook, 2021- 2032

10.9.3. Key Market Drivers and Industry Developments in Argentina Hair and Scalp Care Companies

10.10. Rest of Latin America

10.10.1. Key Statistics

10.10.2. Rest of Latin America Hair and Scalp Care Market Size Outlook, 2021- 2032

10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Hair and Scalp Care Companies

CHAPTER 11- MIDDLE EAST AND AFRICA HAIR AND SCALP CARE MARKET SIZE ANALYSIS AND OUTLOOK

11.1. Middle East and Africa Hair and Scalp Care Market Overview

11.2. Leading Companies Operating in Middle East and Africa

11.3. Key Industry Statistics, 2026

11.4. Middle East and Africa Hair and Scalp Care Market Trends and Growth Opportunities to

11.5. Middle East and Africa Hair and Scalp Care Market Size Outlook by Type

11.6. Middle East and Africa Hair and Scalp Care Market Size Outlook by Application

11.7. Middle East and Africa Hair and Scalp Care Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Hair and Scalp Care Market Size Outlook, 2021- 2032

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Hair and Scalp Care Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Hair and Scalp Care Market Size Outlook, 2021- 2032

11.9.3. Key Market Drivers and Industry Developments in the UAE Hair and Scalp Care Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Hair and Scalp Care Market Size Outlook, 2021- 2032

11.10.3. Key Market Drivers and Industry Developments in Africa Hair and Scalp Care Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Hair and Scalp Care Industry

L'Oréal S.A.

Unilever

The Procter & Gamble Company

Henkel AG & Co. KGaA

Kao Corporation

Shiseido Company

The Estée Lauder Companies

Johnson & Johnson

Amway Corp.

Revlon

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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