Beyond the 'Sephora kids': why Asia's beauty boom might hit a wall

The industry is capitalising on feelings of insecurity, but regulators may be stepping in. **By Kritika Rai and Ella Carnegie-Brown**

IF YOU want to understand the direction the global beauty industry is heading in, do not start at a luxury counter in Paris.

Start with the social media feeds. The skincare tutorials on Douyin, the childlike aesthetics woven through Korean and Japanese influencer culture and increasingly, the tweens across Singapore, Seoul and Jakarta adopting rituals once reserved for adult consumers.

This is the leading edge of what we call the "cute economy": a fast-expanding market in which softness, innocence and youthfulness are not just aesthetic choices, but also commercial engines.

It is one of the most lucrative forces in Asian consumer markets today, exported worldwide. It is also, we suspect, approaching the kind of reckoning that food, tobacco and social media have already faced.

The numbers explain the reason for brands leaning into this hard.

The Asia-Pacific is the largest and fastest-growing beauty region on the planet, accounting for 30 per cent of the global beauty and personal care market value, going by a 2025 report by London-based market research company Euromonitor.

Its most striking growth is at the youngest end of the market.

Skincare aimed at – or adopted by – pre-teens has moved from niche to mainstream in barely two years. Nielsen market research in 2023 showed that families with children aged 12 and below spent US$2.4 billion on skincare and make-up, and the demand is still growing.

So-called "Sephora kids" – children following multi-step serum routines they saw on TikTok – became a global news story precisely because the commercial impulse behind it is so efficient.

That logic rests on a genuinely powerful lever: cuteness. The rounded faces, large eyes, smooth skin and soft signals that researchers call "baby schema cues" reliably capture attention, triggering warmth and care.

Beauty brands have learned to deploy these cues far beyond the face. They deploy them in pastel packaging, in product textures, in the high-pitched baby voice some influencers perform, and even in the names of products.

The result is a category that does not merely sell appearance. It sells reassurance, and it sells it to consumers who are increasingly young.

In an era of economic anxiety and digital overstimulation, that comfort is commercially potent. Cuteness may be flourishing not despite uncertainty but partly because of it, and the industry has been quick to capitalise on this phenomenon.

From self-care to self-surveillance

The commercial catch is that the same mechanics that make cute beauty so engaging can also make it self-perpetuating.

A perceived imperfection prompts a purchase. The purchase brings relief, the relief fades and the next imperfection appears.

Platforms accelerate the cycle by presenting unattainable standards as ordinary ones.

As fatigue grows around perfection-driven routines, the smart move for brands is not more correction, but moving towards concepts associated with "comfort beauty". PHOTO: UNSPLASH

Procedures, which films such as *The Substance* have satirised, were once marketed to women over 40, including Botox, fillers and "tweakments" – otherwise known as non-surgical cosmetic procedures designed to subtly enhance natural features.

They are now discussed openly by women in their 20s, and the entry age keeps falling.

For the beauty industry, this is, in the short term, a growth story: more categories, more frequency and more lifetime value for each customer.

But growth fuelled by amplified dissatisfaction carries a reputational liability.

Social platforms did not create our sensitivity to appearance, but they have industrialised it. Brands did not invent insecurity, but parts of the category have learnt to monetise its repetition.

That is precisely the pattern that, in other industries, eventually invites scrutiny.

Here is the development the industry should be watching most closely.

Governments are no longer treating children's exposure to engineered online persuasion as a private matter.

Australia amended its Online Safety Act in 2025 to restrict the use of social media for under-16s.

Other jurisdictions in Europe and Asia are weighing age verification, advertising limits and design restrictions aimed at protecting adolescents online.

So far, these debates have focused on social media broadly. But it is not a large leap from targeting algorithmically addictive feeds to beauty content that teaches children to find flaws in their own faces.

Once regulators and the media reframe tween skincare marketing as a child-protection issue rather than a lifestyle trend, the questions now asked of social media platforms about manipulation, consent and harm to minors will be asked of beauty brands, too.

Marketing that targets – or simply reaches – preteens with anxiety-amplifying claims is the most exposed.

For brands, the strategic risk is not just a single ban. It is being caught on the wrong side of a cultural reframing, the moment when the advertising that looked like clever market engineering is suddenly read as something more ethically fraught.

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Next major opportunity

This is not only a warning. It is also a signpost to the beauty industry's next major opportunity – one which the most forward-looking brands are already turning towards.

As fatigue grows around perfection-driven routines, the smart move for brands is not more correction, but moving towards concepts associated with "comfort beauty".

This includes products, rituals and messaging built around reassurance rather than escalation.

That means simpler routines and prioritising skin health over flaw elimination, with fewer interventions and offering the permission to stop.

Counter-intuitively, restraint itself can become aspirational and defensible.

A first-mover advantage exists here.

The brand that positions itself as the one that helps consumers, especially young ones, feel that their natural face is enough, will build the trust that a regulatory and cultural shift will reward.

The next competitive edge in beauty may come less from inventing another miracle ingredient.

It may instead come from helping define a psychologically healthier model of beauty and being seen to have done so early.

Asia has long been the global laboratory for the next frontier of beauty. It may be again. But its next export need not be another ideal of perfection.

It could be something more valuable: a model of beauty refusing to turn ordinary skin into a problem to be solved.

That would be more than trend leadership. It would be category reinvention.

The future of beauty may not belong to the brands that amplify insecurity.

It may belong to the ones that help young consumers feel confident and secure in their own appearance, rather than making them feel that it is a problem waiting to be fixed.

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