

Bubble Tea Market in EU to Reach USD 1.9 Million by 2035 — Rapid Growth Across APAC, Europe, USA & Saudi Arabia

EU bubble tea demand is set to surge driven by rising café culture, flavor innovation, and growing consumer preference for experiential beverages.

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-- The [European Union bubble tea market](#) is on a strong growth trajectory, projected to rise from USD 0.7 million in 2025 to nearly USD 1.9 million by 2035, reflecting an impressive CAGR of

10.0%. This steady expansion underscores the continent's growing enthusiasm for customizable, flavor-rich beverages and the influence of Asian café culture within Europe's mainstream foodservice landscape.

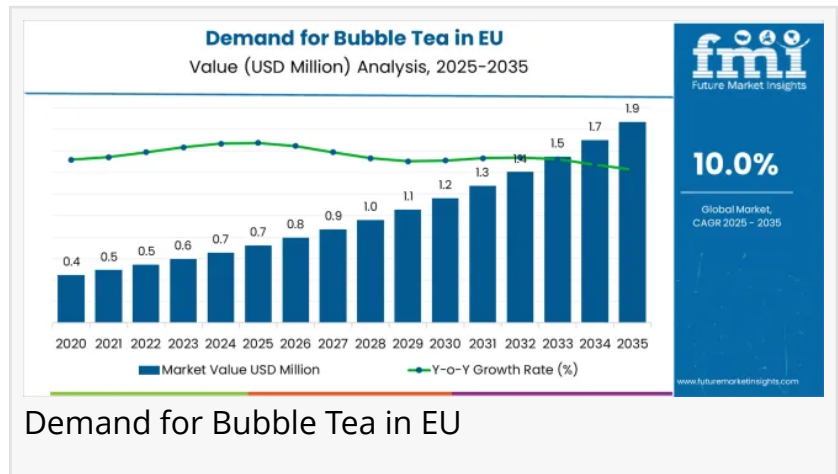
Initially popularized in Taiwan, bubble tea has evolved from a niche product to a mainstream lifestyle beverage across major European cities. The market's growth is rooted in experiential consumption, where drinks are not just refreshments but expressions of identity, creativity, and social connection.

Lifestyle-Driven Growth and Customization Demand

Between 2025 and 2035, EU bubble tea sales are forecast to expand by 171.4%, equating to a rise of USD 1.2 million. This nearly 2.7X market expansion reflects a clear consumer shift toward beverages that blend sensory experience and visual appeal.

- Ready-to-drink formats dominate with an 87.6% share in 2025, maintaining leadership despite growing instant-mix adoption.
- Food service channels represent 68% of sales, led by cafés and quick-service outlets offering premium, customizable drinks.

Social media has been instrumental in bubble tea's success. Platforms such as Instagram and



TikTok have amplified its aesthetic appeal, while younger demographics—particularly Gen Z and Millennials—see bubble tea as a symbol of cultural sophistication and global awareness.

Flavor and Ingredient Innovation Lead the Way

Innovation remains the foundation of the bubble tea industry's growth. Consumers are increasingly drawn to fruit-flavored, plant-based, and functional formulations that align with wellness and sustainability trends.

- Tapioca pearls continue to dominate, holding a 42.6% market share in 2025, though gradually giving way to popping boba (14%) and fruit bits (12%) by 2035.
- The rise of oat milk, soy milk, and almond milk alternatives mirrors the plant-based beverage movement across Europe.
- New product concepts, such as probiotic-infused teas and vitamin-enriched blends, are creating overlap with the functional beverage segment.

Regional Analysis: Germany Leads, Rest of Europe Rises Fastest

Europe's bubble tea growth shows distinct regional patterns:

- Germany remains the largest market, expanding from USD 173.0 million (2025) to USD 417.1 million (2035) at a 9.2% CAGR, supported by urban density and Asian community influence.
- France will grow at 9.4% CAGR, driven by Parisian café culture and demand for premium, artisanal beverages.
- Italy, traditionally loyal to coffee, is showing an accelerating 9.8% CAGR as younger consumers embrace new drink experiences.
- Spain will witness the highest adoption among major markets with a 10.2% CAGR, boosted by social consumption habits and tourism.
- The Netherlands, an early adopter hub, leads innovation with a 10.5% CAGR, emphasizing sustainability and tech integration.
- Rest of Europe—covering Poland, Scandinavia, Austria, and Belgium—shows the fastest CAGR of 10.8%, driven by rising youth populations and expanding middle classes.

Key Market Drivers

1. Cultural Globalization: Asian pop culture, K-pop, and anime influence beverage preferences, making bubble tea a cultural bridge product.
2. Health-Conscious Formulations: Rising demand for reduced-sugar, functional, and dairy-free options expands market accessibility.
3. Sustainability Practices: Widespread transition to biodegradable straws, cups, and fair-trade ingredients aligns with EU sustainability priorities.
4. Digital Expansion: Online ordering platforms and delivery aggregators have democratized access, boosting visibility and frequency of purchase.

Competitive Landscape: Fragmented Yet Dynamic

The EU bubble tea market remains highly fragmented, with the top four brands holding just 10.9% share. Independent cafés and regional chains dominate due to low entry barriers and high localization adaptability.

- Gong Cha (4%): Leads with its authentic Taiwanese heritage and franchised expansion strategy.
- CoCo Fresh Tea & Juice (3.5%): Known for premium positioning and fresh ingredients.
- Tiger Sugar (1.8%): Capitalizes on viral brown sugar pearl milk trend.
- Sharetea (1.6%): Balances authenticity and affordability for younger consumers.

As the market matures, consolidation through franchising and acquisitions is expected to intensify, with global brands targeting Europe for growth.

Outlook Through 2035

By 2030, the EU bubble tea sector is projected to evolve into a dual-tier ecosystem—premium artisanal cafés coexisting with mass-market RTD and bottled formats. Innovation in flavors, texture experiences, and functional fortification will sustain momentum through 2035.

Key Highlights:

- Market to expand 2.7X from 2025–2035
- CAGR: 10.0%
- Fastest growth in Rest of Europe (10.8%)
- Leading product type: Tapioca Pearls (40% by 2035)
- Dominant format: Ready-to-Drink (85% by 2035)

As European consumers continue to merge culture, health, and experience in beverage choices, bubble tea is poised to remain one of Europe's most dynamic specialty drink categories through 2035.

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