



Euromonitor
International

Full-Service Restaurants in Malaysia

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Cost pressures squeeze full-service formats as value growth stalls

INDUSTRY PERFORMANCE

Rising mall overheads narrow full-service pricing flexibility
Chained Asian formats gain ground with variety and localised menus
Eat-in supports performance, while off-premise demand softens as prices rise

WHAT'S NEXT?

Higher fixed costs will restrain expansion and intensify efficiency efforts
Convenience-led dining reshapes willingness to pay for service
Digital ordering spreads though expectations on hospitality remain mixed

COMPETITIVE LANDSCAPE

QSR Stores leads, but recovery remains uneven across formats
Value-led Asian chains accelerate thanks to membership rewards and sharp pricing
Independents lead through flexibility and service differentiation

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Consumer Foodservice in Malaysia - Industry Overview

EXECUTIVE SUMMARY

Cost pressures reshape demand, while convenience and digital tools evolve

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value growth holds as operators compete on affordability
Convenience occasions shift as takeaway softens and drive-through strengthens
Experience-led café visits expand, supported by loyalty and app ecosystems

WHAT'S NEXT?

Outlet expansion and tourism support a favourable growth trajectory
Digital ordering scales, but service expectations remain segmented

Supply-side support favours value meals, while small-format concepts keep scaling

COMPETITIVE LANDSCAPE

Golden Arches maintains leadership while sharpening value positioning

Ai-CHA accelerates through rapid rollout and halal positioning

Emart24 expands South Korean-led convenience food propositions, anchored in local sourcing

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Chained operators outpace independents as franchise-led expansion continues

Small-format, convenience-led sites gain relevance, but quality control becomes a constraint

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