



Euromonitor
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Consumer Foodservice in Malaysia

March 2026

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EXECUTIVE SUMMARY

Cost pressures reshape demand, while convenience and digital tools evolve

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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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INDUSTRY PERFORMANCE

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Specialist chains gained momentum as cafés became social and third-space venues

Affordability and differentiation become more important as choice widens

WHAT'S NEXT?

Moderate growth outlook as new entrants and expansions raise competitive intensity

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Small-format, low-price coffee propositions widen access points

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Chained Asian formats gain ground with variety and localised menus

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WHAT'S NEXT?

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Limited visibility constrains demand in 2025
Ikea-linked traffic lifts chained operators
Price-led dining sustains relevance, but taste expectations remain challenge

WHAT'S NEXT?

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INDUSTRY PERFORMANCE

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Value offers shape buying decisions, while takeaway and delivery dominate fulfilment

WHAT'S NEXT?

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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COMPETITIVE LANDSCAPE

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