



Euromonitor
International

Full-Service Restaurants in Malaysia

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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

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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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