



Consumer Foodservice By Location in Malaysia

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail locations prove resilient in 2025, while travel gains importance in the outlook

INDUSTRY PERFORMANCE

Retail locations deliver strongest value growth in 2025 as mall openings reshape footfall
Standalone locations gain traction as operators seek cost flexibility
Online takeaway ordering loses momentum, while platform-led delivery remains promotion-driven

WHAT'S NEXT?

Travel locations set to become key growth engine as visitor flows rise
Standalone expansion accelerates as operators prioritise controllable cost structures
Retail cost exposure increases pressure on space optimisation and pricing

COMPETITIVE LANDSCAPE

Large chains prioritise retail and travel to capture high-footfall demand
Standalone specialists strengthen coverage through convenience-led site selection

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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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