



Euromonitor
International

Limited-Service Restaurants in Malaysia

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2025 DEVELOPMENTS

Cost-led value competition intensifies as brands scale up

INDUSTRY PERFORMANCE

Trading down favours value-led burger and chicken players

Convenience-led limited-service formats outperform as mobility improves

Value bundles and flavour rotation sustain interest and protect volumes

WHAT'S NEXT?

Network expansion and policy support reinforce value propositions

Eat-in remains central, while delivery and takeaway face structural headwinds

Livestock incentives support supply resilience and low-price positioning

COMPETITIVE LANDSCAPE

Golden Arches leads, while value pricing offsets demand sensitivity

Fast-scaling concepts target young consumers with novelty and local alignment

Chained formats retain the largest share, but execution risk rises as franchising expands

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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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