



# Consumer Foodservice in Malaysia

March 2026

Table of Contents

## Consumer Foodservice in Malaysia

### 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

#### CHANNELS

Chained operators outpace independents as franchise-led expansion continues

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

#### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in Malaysia

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Coffee-led occasions broaden as value, aesthetics and convenience shape demand

#### INDUSTRY PERFORMANCE

Chain expansion and tourism support value growth in 2025

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  
Eat-in to central, while drive-through and app ecosystems expand convenience occasions  
Small-format, low-price coffee propositions widen access points

#### COMPETITIVE LANDSCAPE

Zuspresso leads as digital ordering and value promotions support scale advantages  
Operators prioritise app-based engagement as younger consumers respond to rewards and convenience  
Independents retain largest share, supported by proximity, signature menus and neighbourhood formats

#### CATEGORY DATA

- Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
- Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
- Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
- Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
- Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
- Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
- Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
- Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
- Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
- Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
- Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
- Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
- Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
- Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

[Full-Service Restaurants in Malaysia](#)

#### 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

#### CATEGORY DATA

- Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025  
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025  
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

## Limited-Service Restaurants in Malaysia

### KEY DATA FINDINGS

#### 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

#### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025  
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025  
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025  
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

### Self-Service Cafeterias in Malaysia

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Niche format holds steady as price-led dining shifts elsewhere

##### INDUSTRY PERFORMANCE

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?

Future growth curbed, with value-seeking diners shifting to other channels

Food courts and gourmet hubs will gain popularity in major cities

Eat-in to stay central and delivery remain peripheral, with independents set to lose value

##### COMPETITIVE LANDSCAPE

Ikano Corp leads thanks to reinforced IKEA in-store proposition

Ikano Corp drives channel momentum through affordability and in-store promotions

Independents retain numerical scale, but chains remain limited by IKEA footprint

##### CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

## DISCLAIMER

### Street Stalls/Kiosks in Malaysia

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Rapid kiosk rollouts lift value sales, while low-price offers reset competition

##### INDUSTRY PERFORMANCE

Value sales rise amid rapid chain expansion and youth-led demand

Chained kiosks set the pace with low prices, new flavours and fast service

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

##### WHAT'S NEXT?

Expansion pipelines keep momentum positive, with halal positioning becoming more central  
Takeaway and delivery remain the default, while eat-in stays structurally limited  
Scaling pressure raises the importance of brand governance and product consistency

## COMPETITIVE LANDSCAPE

LOOB leads, but premium positioning faces sharper value competition  
Ai-CHA and Mixue accelerate through rapid rollout, halal alignment and aggressive pricing  
Independents retain broad presence, buoyed by new retail space and low entry barriers

## CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025  
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025  
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025  
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025  
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025  
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025  
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025  
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025  
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030  
Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030  
Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030  
Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030  
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030  
Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

## DISCLAIMER

[Consumer Foodservice By Location in Malaysia](#)

## 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

## CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025  
Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025  
Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025  
Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025  
Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030  
Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030  
Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030  
Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030  
Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030  
Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030  
Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030  
Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030  
Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030  
Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030  
Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030  
Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030  
Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030  
Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030  
Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

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