# Consumer Foodservice in Malaysia

March 2026

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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
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



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

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



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## 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

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### 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

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