



# Cafés/Bars in Malaysia

March 2026

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## Cafés/Bars in Malaysia - Category analysis

### 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

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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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