



Euromonitor
International

Limited-Service Restaurants in Malaysia

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Limited-Service Restaurants in Malaysia - Category analysis

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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

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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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