



Euromonitor  
International

# Cafés/Bars in Malaysia

March 2026

Table of Contents

## 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 1 - Cafés/Bars by Category: Units/Outlets 2020-2025

Table 2 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025

Table 3 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025

Table 4 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025

Table 9 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030

Table 12 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

### DISCLAIMER

## 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

## 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 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/cafes-bars-in-malaysia/report](https://www.euromonitor.com/cafes-bars-in-malaysia/report).