Euromonitor International

Limited-Service Restaurants in Malaysia

March 2026

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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

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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