



Agriculture and  
Agri-Food Canada

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**International  
Markets  
Bureau**

**MARKET ANALYSIS REPORT | JULY 2011**



## **The Malaysian Consumer**

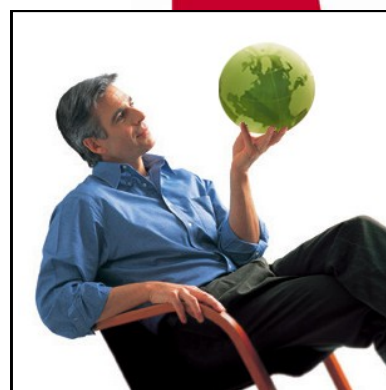
Behaviour, Attitudes and  
Perceptions Toward  
Food Products



Source: CIA World Factbook



Source: C. Palluau



## The Malaysian Consumer

### Behaviour, Attitudes and Perceptions Towards Food Products



#### ► EXECUTIVE SUMMARY

Malaysia is a multiethnic nation spanning Peninsular Malaysia and the island of Borneo. The country is comprised of thirteen *negeri-negeri*, or states: Johor, Kedah, Kelantan, Melaka, Negeri Sembilan, Pahang, Perak, Perlis, Pulau Pinang, Sabah, Sarawak, Selangor, and Terengganu, and one federal territory encompassing the city of Kuala Lumpur, Labuan, and Putrajaya (CIA World Factbook, 2011).

Originally a producer of raw materials such as rubber, palm oil, petroleum, timber and tin, it is a middle-income country that has grown into a multi-sector economy that focuses on high-technology industries, as well as medical technologies and pharmaceuticals. While agriculture continues to hold a strong place in its economy, a government focus on advanced technologies as well as diverse sectors, has changed the economic landscape of this nation. In 2009, its Gross Domestic Product's (GDP) composition by sector was estimated to be 49.7% in services, 40.9% in industry, and 9.4% in agriculture (CIA World Factbook, 2011).

Malaysia's ethnic composition is formed primarily by Malays, Chinese, Indian, and Indigenous groups. With the Malays and Indigenous groups being the longest-standing ethnicities in the country, certain privileges are extended to them by the government. Although these different ethnic groups appear to co-exist peacefully, there continues to be an underlying tension amongst them (Euromonitor, 2011).

Canada and Malaysia enjoy good trade relations, with Canada providing almost 1.3% of Malaysia's global imports. In 2010, Malaysia's top agri-food and seafood imports from Canada were soybeans, non-durum wheat, wheat flour, rapeseed oil, and frozen sardines. For more detailed information regarding these top five products and Canada's main competitors, please refer to Table 1 on page 3 of this report (AAFC Fact Sheet on Malaysia, June 2010).

This report was prepared based on multiple sources of information and is intended to assist the reader in understanding who the Malaysian consumer is, and the factors that influence their food-purchasing decisions. This general overview may be useful in supporting Canadian companies in the evaluation and design of a sound marketing strategy for entering the Malaysian market.

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“The Nation's motto: “Bersekutu Bertambah Mutu” means Unity is Strength.”



## ► GLOBAL TRADE POSITION AND CANADA'S TRADE RELATIONSHIP WITH MALAYSIA

*\*Unless otherwise noted, all data in this section was derived from the Global Trade Atlas, and reflects 2010 figures.*

- Malaysia is a net exporter of agri-food and seafood products with a global surplus of CAD\$9.7 billion. However, Malaysia is a net importer of agri-food and seafood products in terms of trade with Canada, with a deficit of CAD\$133.9 million.
- Malaysia's key agri-food and seafood imports from the world were cereals, cocoa, palm oil, sugars, food waste, and coconut/palm kernel oil.
- Key supplying countries were Indonesia, China, Thailand, Argentina and Australia. Canada was Malaysia's 14<sup>th</sup> largest supplier of agri-food and seafood products with almost 1.3% of the country's imports, marking a 2.7% decrease in share from 2009.
- Malaysia's top agri-food and seafood imports from Canada were soybeans, non-durum wheat, wheat or meslin flour, rapeseed/colza oil, and frozen sardines (table 1).
- Canada's top agri-food and seafood imports from Malaysia were refined palm oil, vegetable fats and oils, cocoa butter, edible fat mixtures, and coconut oil (Global Trade Atlas).

**Table 1: Malaysia's Top Imports from Canada and the Main Competitors**

Product	Top Malaysian Supplier	Canada's Rank as Malaysian Supplier
Soybeans	United States	2
Non-durum wheat	Australia (1) United States (2)	3
Wheat/meslin flour	Australia	2
Rapeseed/colza oil	United States	2
Frozen sardines	Mexico	2

*Source: Global Trade Atlas, 2011*



*Source: CIA World Factbook, 2011*

## ► ECONOMY

Malaysia is considered an upper middle-class country with over 60% of the population considered to be middle-income (United States Department of Agriculture). Malaysia's central bank system with healthy foreign exchange reserves and a well-developed regulatory regime, were major factors in limiting the nation's exposure to the global financial crisis and, as such, the Malaysian economy only experienced a slight drop of 1.7% in real GDP growth in 2009; its estimated real growth rate for 2010 is 7.2% (CIA World Factbook, 2011).

The current Prime Minister, Mohamed Najib bin Abdul Razak, is shifting focus to domestic demand in order to reduce reliance on exports. However, exports are a main driver of the Malaysian economy and will continue to hold a prominent role. Some of the nation's main exports include: electronic equipment; petroleum and liquefied natural gas; wood and woodproducts; palm oil; rubber; textiles; and chemicals (CIA World Factbook, 2011).



*Palm Oil Plantation, Malaysia  
Source: Treehugger.com*



In addition, another focus of the Prime Minister has been on attracting increased investments, particularly in the areas of Islamic finance, high-technology industries, medical technology, and pharmaceutical industries. This is aimed at achieving the nation's goal of becoming a high-income status country by 2020 (CIA World Factbook, 2011). However, one of the steps that may be required is a revision to the New Economic Policy that gave special economic and social preferences to the *bumiputras* (considered to be the “original” people of Malaysia—see box on page 7), a move that has stimulated significant opposition, mainly from the Malay nationalists who would likely be most affected by this revision (CIA World Factbook, 2011).

## ► GOVERNMENT INITIATIVES

With the changing landscape from a developing to a developed country, the Malaysian government has implemented various initiatives to help both economic growth and the overall health of its nation. One of the largest initiatives is the Multimedia Super Corridor (MSC) that began in 1996. The physical infrastructure for the implementation of the MSC is currently concentrated in six locations in the Klang Valley, the area surrounding the nation's capital city, Kuala Lumpur.

The Multimedia Development Corporation (MDC) was created in order to oversee all aspects of the MSC. There are seven key points that form the MSC:

1. *Electronic Government* – to create a paperless administration with increased use of electronic and multimedia tools to access Government services.
2. *Smart Schools* – to create an IT-literate society by 2020.
3. *Tele-Health* – to facilitate general access to healthcare and to increase public awareness of health issues.
4. *Research and Development (R&D) Clusters* – to create structures that will aid in R&D activities, in particular, coordination between universities and corporations in creating cutting-edge multimedia technologies.
5. *Multipurpose Card* – a smartcard that combines both government data and general customer services (for example, an ID card, credit card, drivers' license, passport, phone card, health information, etc.).
6. *E-Business* – companies involved in the MSC process will be able to benefit from the technological infrastructure thus enabling them to eventually have real-time operational overview and control of their production from start to finish.
7. *Technopreneur Development* – to support and grow, small and medium-sized enterprises (SMEs) in the Information and Communications Technology sector as well as the multimedia industries, in order for these companies to be world-class competitors.

In March 2010, the *National Broadband Initiative (NBI)* was launched as the Government's joint project with Telekom Malaysia to bring broadband internet to the entire nation. The hope is that, via capacity building initiatives, Malaysians' awareness of broadband will increase. Increased access to E-Government services will be an attractive feature for the use of broadband as it will aid rural consumers to access services that they would otherwise have to travel for, and for urban consumers, they can now access these services at any time.

### ***New Economic Policy (NEP) of 1970***

The NEP was created in response to the race riots that occurred in and around Kuala Lumpur in May of 1969. Its two main pillars were:

- *to eradicate poverty regardless of race.* As poverty has virtually been eliminated in the country, the NEP was successful in this regard; and
- *to restructure society to eliminate the identification of race with economic function.* This goal is more controversial as its actions were geared toward reducing the socioeconomic disparities that were interethnic in nature. Redistribution took place through special allocations that were given to *bumiputras*, as it appeared that they did not play as great a role in such areas as university enrolment, business, and real estate ownership. The restructuring has primarily impacted the middle class and the business community, and this is where most dissent can be felt. There have also been some adjustments on the part of the people in order to circumvent these rules. Business coalitions have come into effect with Malays securing payment by partnering with *non-bumiputra* Malaysians (primarily Chinese and Indian) in order to gain access to government-sponsored business opportunities.

**Source:** United Nations Research Institute for Social Development





The NBI is also aimed to decrease broadband access costs and increase community access in order for it to be more affordable to all Malaysians. It has five main steps in order to achieve its implementation:

1. Rakyat Internet Centres (Pusat Internet Rakyat) and mini Community Broadband Centres;
2. One Million Netbook Initiative – to distribute notebooks to poor students nationwide;
3. Setting up E-Kiosks – for increased access;
4. Community Broadband Centres to the Home; and
5. Expansion of Cellular Coverage.

According to the Group Chief Economist of RAM Holdings Bhd., Dr Yeah Kim Leng, the NBI should be a key driver in this knowledge-based economy. Through its early implementation, it is anticipated that Malaysia will increase its competitiveness and innovation and ensure that it maintains its economic growth.

### ***The SMART Tunnel***



The Stormwater Management and Road Tunnel, or SMART Tunnel is a multi-purpose tunnel built in 2007 and aimed at addressing both the issue of flash floods as well as rush-hour traffic in the nation's capital. To date, it is the longest multi-purpose tunnel in the world, spanning 9.7 km from Ampang in the north of the city, to Salak Selatan in the south of the city. It has three modes at which it functions: the first mode is for normal conditions where traffic utilizes the motorway and the storm water tunnel is not used; the second mode is used for most storms where the lower portion of the tunnel is used to divert flood water and traffic continues to use the motorway in the upper portion of the tunnel; and the third mode is reserved for major storms when the motorway is closed to traffic and opened for additional flood water flow. As of last year, the SMART tunnel has prevented seven flash floods from potentially devastating the city centre.

**Source:** *Stormwater Management and Road Tunnel, 2011*

## **► DEMOGRAPHICS**

### ***Population***

For a country that would fit into Canada 30 times, Malaysia's population is only slightly smaller at close to 28 million, with estimates that it will reach 30 million by 2015 (Euromonitor, 2011). With its small size and a growing population, the population density is increasing and is becoming more urban. Datamonitor estimates that the urban population has steadily increased from 67.3% of the total population in 2005, to 71.8% of the total population in 2010 (Datamonitor, 2011). Between 1995 and 2007, Malaysia experienced rapid urbanization, and most of the growth has been occurring in the main cities of Kelang, Petaling Jaya, and Shah Alam, all cities on the outskirts of Malaysia's capital Kuala Lumpur, and areas that are experiencing rapid industrialization. Some of this urban growth can be attributed to migration as Malaysia experienced growth from just over 1 million migrants in 1995, to 2.3 million migrants in 2010 (Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, 2008).

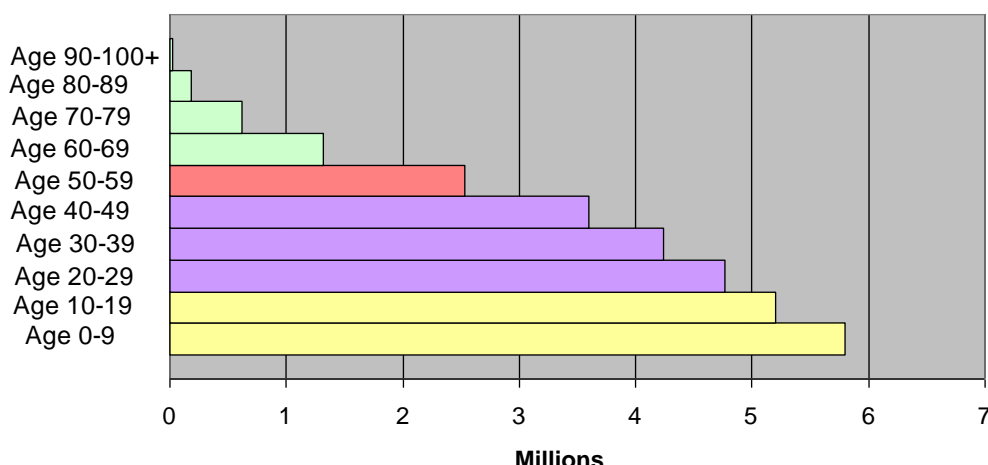


*Traditional tin work in increasingly urban Melaka, Malaysia*

**Source:** C.Palluau, 2007



**Figure 1: Population Distribution in Malaysia, 2010**



*Source: U.S. Census Bureau, 2010.*

Like other developing nations, Malaysia's population is a young one (Figure 1). Although the median age has increased from 22.5 years in 1995 to 26.5 years in 2010, it is still significantly lower than Canada's median age of 40.7 years in 2010 (CIA World Factbook, 2011). It is estimated that by 2015, over 50% of the population will be 30 years old or younger, with a majority making up the working population of the nation (Euromonitor, 2011). This group will be primarily located in urban areas, as that is where job opportunities exist.

With higher incomes and education as well as fewer dependents, this large, young, working population has more disposable income than ever before. Both this and the fast-paced lifestyle of this age group, will dictate the food trends amongst urban Malaysians in the coming years.

## Forecasts

The United Nations forecasts that between 2010 and 2050, Malaysia's population will grow by 41%, from just under 28 million people to 39.6 million people. Most of this growth is expected to continue to occur in urban areas, with population density rising from 85 people per sq. km in 2010, to 120 people per sq. km in 2050. Some of this growth may be attributed to the continued increase in international immigration.

The United Nations also predicts that the national birth rate will continue to decrease from 550 per year between 2005 and 2010, to 476 per year between 2045 and 2050. This will result in an increase in the median age of the Malaysian population from 26.3 years in 2010, to 39.3 in 2050 (Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat).



*A street vendor of Chinese descent selling popiah; Melaka, Malaysia.*  
**Source: C. Palluau, 2007**

All of these factors are expected to play a large role in shaping Malaysian consumers' demands of the food marketplace. A large and growing, young, primarily urban population, will look for convenient as well as healthy food options.

## Ethnicity

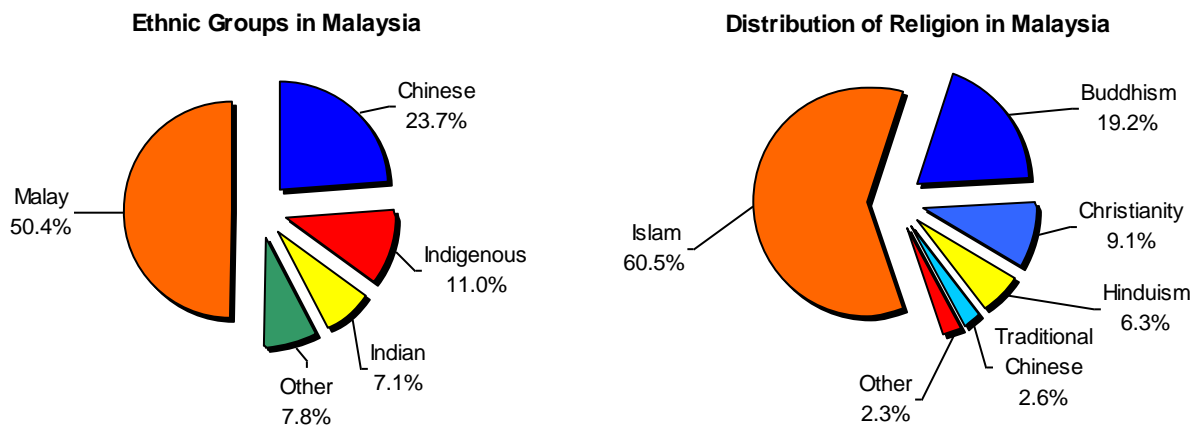


Located at the tip of the Asia's continental western side and creating a gateway to India and Africa through the Straits of Malacca, Malaysia is one of the most ethnically and religiously diverse nations in the world, where the co-existence of these various groups is largely peaceful. The Malays are the largest ethnic group at 50.4% of the population and are also the group in power. They are followed by the Chinese at 23.7% of the population, Indigenous groups at 11%, and the Indian population at 7.1%. These groups are fairly evenly distributed across the nation with the exception of the predominantly Malay population on the east coast, as well as the concentration of most indigenous groups in the region of Sabah-Sarawak, on the island of Borneo.

The religious divisions are closely correlated with these ethnic groups (Figure 2), with 60.5% of the population following Islam, 19.2% following Buddhist beliefs, 9.1% following the Christian faith, 6.3% following Hindu teachings, 2.6% following Traditional Chinese religions such as Confucianism and Taoism, and 2.3% following either another belief system or none at all.

The official language is Bahasa Malaysia (or Bahasa Melayu), however English, Chinese (Cantonese, Mandarin, Hokkien, Hakka, Hainan, and Foochow), several Indian languages (Tamil, Telugu, Malayalam, Punjabi), and Thai are also widely spoken. Other indigenous languages are spoken on the East Coast in Sabah and Sarawak, where Iban and Kadazan are the major languages (CIA World Factbook, 2010).

Figure 2: Ethnic and Religious Distributions



Source: CIA World Factbook, 2010

### Malaysian Ethnic Groups

**"Malaysia Boleh!"** is a term coined by Datuk Seri Dr Mahathir Mohamad, Malaysia's fourth prime minister. Translated as "Malaysia Can Do It!" and intended to showcase that Malaysians can achieve anything that they choose, this motto has been a cheer used at sporting events as large as the Commonwealth Games and the Thomas Cup finals (*All Malaysia Info*).

**The Baba Nyonya group** (also referred to as Peranakans) is a small ethnic group within the larger Chinese population. This group descends from the betrothal of the daughter of the Emperor of China, Princess Hang Li Po, to the Sultan of Malacca during the Ming Dynasty. Princess Hang Li Po and her 500 followers formed the first permanent Chinese settlement, and many settlers married local brides thus beginning the first mixed Chinese-Malay population. The men of this group are known as *baba* and the women are known as *nyonya* (also spelled *nonya*). This group assimilated with local culture and customs which can be observed in their food and dress, although the Chinese heritage is not lost and lends its presence in various ways such as furniture and in the *nyonya* cuisine. Since settling, they have held powerful positions such as commodity traders, rubber plantation owners, and *compradores* (middlemen) for Western companies and banks, and have also been involved in civic projects, with many being involved in Malaysia's and Singapore's independence from British rule (*The Peranakan Association of Singapore*).

**"Bumiputra", also known as bumiputera" or sons of the soil**, are the ethnic group formed between the Malays and the indigenous groups of Sabah and Sarawak who are considered to be the "original" people of Malaysia. This term began with the 1957 Malaysian Constitution and its Article 153, which has raised much controversy since its implementation. This Article serves two purposes: 1) to safeguard the special position of the bumiputras, and 2) to establish quotas for bumiputras in federal public service positions, federal scholarships, federal trade or business licences, and tertiary education enrolment (*Confinder Richmond Education*).

## Education



The majority of Malaysians place a strong emphasis on education. This is visible through the Government's provision of highly subsidized primary and secondary education, and the Perbadanan Tabung Pendidikan Tinggi Nasional (PTPTN, or the National Higher Education Fund Corporation), a program that offers loans to graduate and postgraduate students. Furthermore, there has been an increased demand for continuing adult education programs. In 2003, the Government also made it compulsory for parents to send eligible children to school; failure to enrol their children could result in fines, jail time, or both (Euromonitor, 2011).

- ▶ Consumer expenditure on education has been growing, from US\$1.2 billion in 2005 to US\$1.7 billion in 2009 (Euromonitor, 2011).
- ▶ Literacy rates for the adult population (15 years and older) increased by 22%, from 70% in 1980 to 92% in 2008 (World Bank). This can be attributed to the Government's National Economic Policy and one of its goals to increase literacy levels of the nation's citizens.

Religion plays an important role in the education system with a focus being placed on God. The rationale is that through a "firm belief in and devotion to God", citizens will be able to live a holistic and integrated life with family, society, and the nation as a whole (Ministry of Education).

## Households



*Petronas Tower and KL Tower, two of the major buildings in the Capital's skyline*  
**Source:** CIA World Factbook, 2011

Overall, the number of households in Malaysia increased from 4.1 million in 1995, to 5.8 million in 2007. This can be attributed to urban migration due to new job opportunities and increased post-secondary education. Increased urbanization has also affected what Malaysian households look like. Although it is still uncommon for Malaysians to live alone, it is becoming more popular within the younger generations as they begin a new job or attend university. Traditionally, young Malaysians would not leave their family's home until they got married. This shift has affected the priorities for this age group: comfort and convenience. This group will be looking for products that are compatible with the demands of their busy lifestyles, therefore, packaged and prepared food as well as dining out options will play larger roles in this group's life (Euromonitor, 2011).

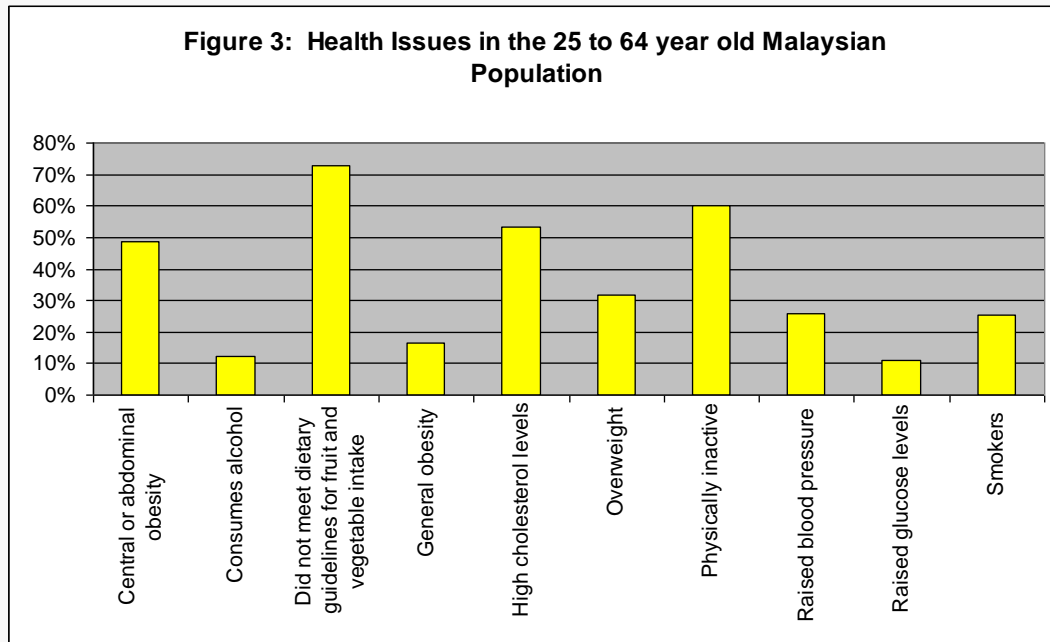
With increased employment and higher education, it is not surprising that household disposable income is also on the rise, with every income category experiencing growth between 1995 and 2007 (Euromonitor, 2011). This growth has had an impact on the purchases of household durables that were perceived to be luxury items such as dishwashers, refrigerators, freezers, and microwave ovens (Euromonitor, 2011). Also influenced by rising income levels, the ratio of mobile phones to fixed telephone lines has increased from 4.48 in 2005, to 7.42 in 2010. This can be attributed to the affordability of mobile devices. Mimicking this trend, the number of internet users has also grown from 46% of the population in 2005, to 69% of the population in 2010 (Datamonitor, 2010).



## Lifestyle and Health



As the Malaysian lifestyle shifts from rural to urban, the diet and activity levels of Malaysians have changed accordingly. More people are living in urban areas and working longer hours. Eating habits have shifted to the convenience of prepared and processed meals. With increased disposable incomes, Malaysians are also able to purchase refrigerators, freezers and microwaves in order to help maximize the usage of these new convenient meal items. As urban consumers' activity level has decreased and jobs have become more sedentary, new health issues are emerging (Figure 3).



Source: WHO, Western Pacific Region "Health Situation and Trend Report on Malaysia", 2005.

The new health issues that the country faces with its increasingly urban lifestyle include heart disease, mental illness, trauma/road traffic injuries, cancer, asthma, obesity, diabetes, and sexually transmitted diseases (including HIV/AIDS), many of the same diseases associated with developed countries. While the Ministry of Health looks to address these new issues, it must also continue to battle health issues more prevalent in developing countries, that are still present in Malaysia, such as dengue fever, tuberculosis, food poisoning, and hand, foot and mouth disease (WHO, 2008).

### Did you know?

Although the Employment Act declares that workers should not exceed 44 hours per 5.5 day work week, Datamonitor found that in 2007, Malaysians tended to work an average of 47 hours per week which could be attributed to the fact that it is common to work overtime, especially in urban areas.

Malaysian schools keep physical activity levels high by making sports mandatory for all those attending. These sports include soccer, basketball, badminton and *sepak takraw*\* for the boys; and netball, volleyball, tennis, basketball and table tennis for the girls. As Malaysians age, these sports change to activities such as swimming, golf, or aerobics, which are easier to incorporate into a busy work schedule (Euromonitor, 2010).

\**Sepak takraw* is also known as kick volleyball and originates in Malaysia, but is now played throughout the world including Canada. It is a combination of soccer, football, volleyball, baseball, badminton and gymnastics (Sepak Takraw Association of Canada).

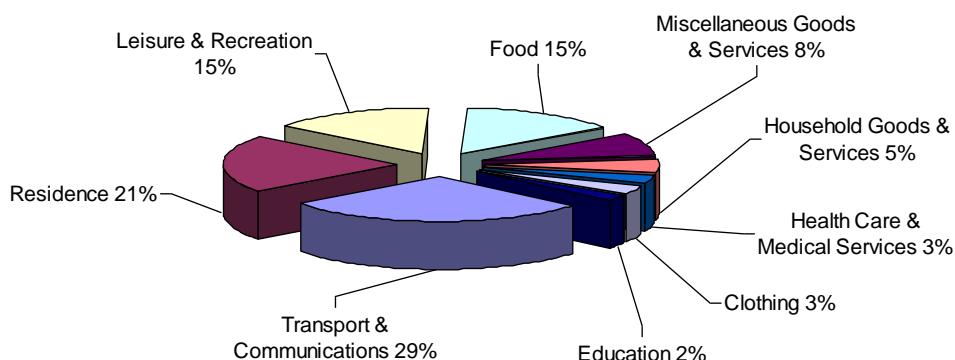


## ► CONSUMPTION AND EXPENDITURES

### *Expenditure Overview*

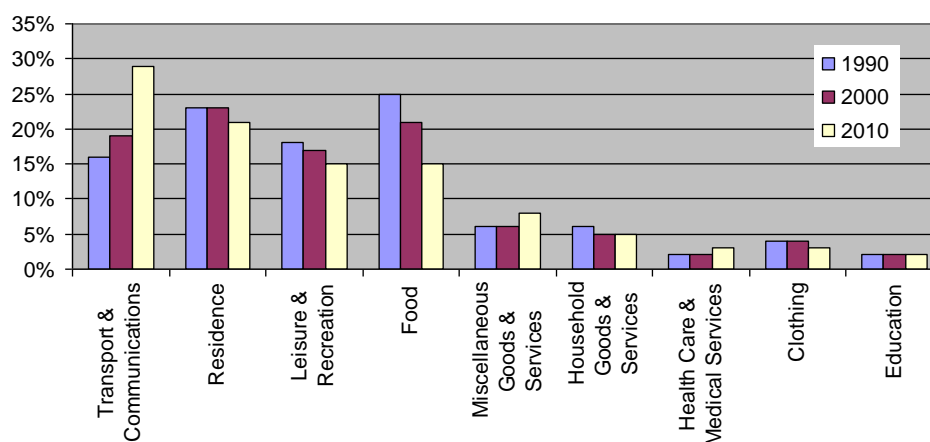
As incomes rise, how consumers allocate their money among goods and services has also shifted. Traditionally, incomes were spent with a primary focus on food. However, with a large portion of the population now living an urban, single, and independent life, younger Malaysians are able to spend their salaries differently. More money is now spent on car ownership, telecommunication such as cell phones and satellite televisions, leisure activities such as dining out and going out to nightclubs and movie theatres, as well as proactive health care (Figures 4 and 5).

**Figure 4: Consumer Expenditure by major sectors in 2010**



Source: Euromonitor 2011, Consumer Expenditures

**Figure 5: Consumer Expenditures in Malaysia over a 20-year period**

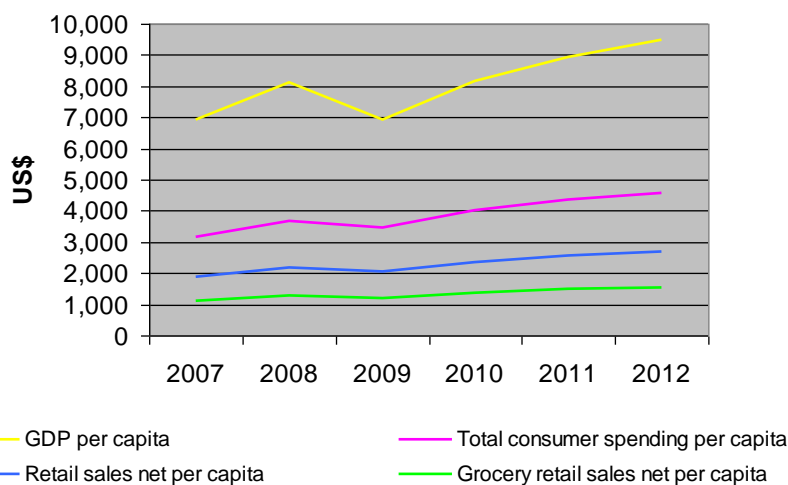


Source: Euromonitor 2011, Consumer Expenditures

Since the economic challenges of 2009, the GDP of Malaysia has been steadily increasing (Figure 6), and it is expected to reach an estimated US\$9,481 per-capita by 2012. This represents a 36% increase from the 2009 total of US\$6,930 per-capita. It can be noted that consumer spending, net retail sales, and net grocery retail sales have also increased (Figure 6).



Figure 6: GDP and Market Sizes in Malaysia, 2007-2012



Source: Planet Retail, 2011

## Grocery Shopping

Overall, the Malaysian consumer always chooses quality when grocery shopping, and when choosing items such as meats and produce, will always look for freshness. These items are usually purchased early in the day at places called “wet markets”; this allows consumers to choose products before the sun is fully up, ensuring optimum quality. Similar to a farmer’s market, a wet market is a traditional, open-air street market where produce, meats and seafood arrive daily, and where most of the meats, fish and seafood are still alive when sold.

Hypermarkets and supermarkets are becoming increasingly popular as they provide convenience, offering a wider variety of products ranging from packaged and processed foods, to fresh foods that consumers would find at a wet market. They also provide non-food items, offering the convenience of a one-stop shop. These stores also offer affordable dine-in restaurants, thereby changing the experience from just shopping to a complete family outing. Many of these modern markets are foreign-owned with major players Giant, Carrefour and Tesco holding a strong presence; the major national player is Jusco, which has recently been taken over by AEON.



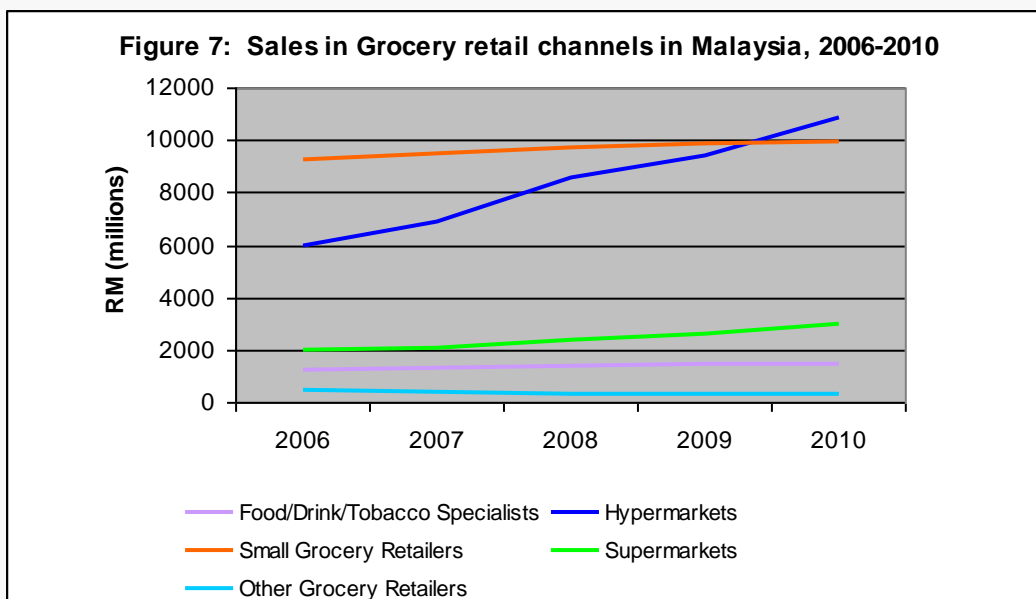
Traditional Wet Market in Kota Kinabalu

Source: journals.worldnomads.com



Giant Hypermarket in Kelana Jaya, Malaysia  
Source: Planet Retail, 2011

In recent years, the growth of hypermarkets has hurt smaller family-run retailers. In an effort to decrease the impact on the independent, local scene, the Malaysian government introduced tighter legislation in 2002 to limit the expansion of hypermarkets (Planet Retail) and also began marketing wet markets to tourists as a cultural experience. However, with the government’s more recent focus on expanding foreign direct investment, this has led to the government supporting more modern retailing such as international hypermarkets and supermarkets. In 2010, hypermarkets’ and supermarkets’ sales value grew by 15% and 14%, respectively, while the value of sales in wet markets and traditional grocery stores declined by 8% (Figure 7). As lifestyles become busier in this burgeoning urban setting, consumers are seeking convenience, comfort, and good value when making purchases; hypermarkets and supermarkets are providing just that (Euromonitor, 2011).



Source: Euromonitor, Grocery retailing 2011

## Consumer Tastes and Preferences

### Food and Special Occasions\*

Food holds an important place in the life of Malaysians. It is not uncommon to have multiple meals a day with each meal being prepared with care and fully enjoyed. National holidays and special occasions are some of the best times to witness the importance of food, and the pride and joy that they have for their cuisine. Some notable national holidays include:

**Chinese New Year or the Lunar New Year**, is a Chinese celebration that begins on the first day of the new moon in a new lunar calendar year, and ends on the 15<sup>th</sup> day. In preparation, houses are cleaned and decorated with red lanterns, banners, and panels bearing themes of happiness, wealth and longevity. On the eve of Chinese New Year, a large dinner is held where family members from near and far gather to enjoy a meal chosen on the basis of auspicious beliefs: a whole chicken to symbolise completeness, whole steamed fish as the Cantonese phrase “have fish every year” sounds like “be blessed every year,” uncut noodles to represent longevity, fatt choy (black moss) to represent prosperity, and baked goods with seeds to symbolise fertility. On New Year’s Day, families and friends burn incense, don new clothing (preferably red), married couples give *ang pow* (red packets with money inside of them) to children and unmarried adults, and over the next few days, *rumah terbuka*, or open house, takes place, where everyone visits one another’s home and bring gifts of mandarin oranges that symbolise wealth, and pomelos that represent abundance. Rumah terbuka is open to all Malaysians, regardless of their religious beliefs.

**Hari Raya Puasa or simply Hari Raya (Day of Celebration)**, marks the end of Ramadan, the month of fasting, and represents a personal triumph for Muslims who have practiced self-restraint and abstinence. Participants make their way to their hometowns, commonly referred to as *balik kampung* (return to the country), to celebrate with family and friends. Many will wear their best clothes with traditional clothing being the preferred choice (*Baju Melayu* for men and *Baju Kurung* for women). Many Muslims practice rumah terbuka, during which *ketupat* (a rice cake wrapped in coconut leaves), is served with *beef rendang* (beef cooked with spices and coconut milk), and *satay* (grilled chicken or beef on a skewer), served with a spicy peanut sauce. The ever-present variety of *kuih*, Malaysian desserts, is also enjoyed at this time.



Rumah terbuka, or “open house”, during Hari Raya Puasa  
Source: sixthseal.com

\* Unless otherwise noted, all information in this section was derived from All Malaysia Info, 2011





**Deepavali or Diwali (Festival of Lights)**, is a Hindu celebration that marks the triumph of good over evil. In anticipation, homes and temples are cleaned and decorated with flowers and offerings of fruits and coconut milk. On the day of Deepavali, devotees bathe in oil to signify purity and then pray at the temples. After prayers, homes are opened up to guests and Indian dishes such as sweetmeats, rice puddings, and *murukku* (a savoury snack made of urad and rice flour, flavoured with spices), are enjoyed.

**Christmas** is enjoyed in Malaysia, as in most places around in the world, for the commercialized features of this holiday including the presence of Santa and his reindeers in shopping malls, and the decoration of homes and businesses with bright lights. However, Christians here also observe Advent and practice praying, Bible reading, and fasting, for the four weeks leading up to Christmas Day. On Christmas Eve, both practicing and non-practicing Malaysians attend midnight mass or Christmas service. Then on Christmas Day, Christian families will entertain guests in their homes during *rumah terbuka* where Western dishes such as nuts, fruitcakes, apple pie and roast turkey are offered, as well as local dishes such as devil's curry and beef rendang.

**Hari Raya Aidiladha or Hari Raya Korban or Hari Raya Haji**, is a Muslim holiday that marks the end of the hajj pilgrimage to Mecca. This is one of the most celebrated festivals by Muslims around the world as the hajj is one of the five tenets of the religion and all Muslims, as long as they have the means and are healthy, are required to do it once in their lifetime. Aidiladha commemorates the sacrifice made by the prophet Abraham with the sacrifice of an animal such as a lamb, goat, cow, or camel on this day. One third of the meat is given to the family that offered the sacrifice, another third is given to family members and friends present, and the final third is given to the poor. The sacrifice occurs in the morning, followed by prayers at the mosque, and then the rest of the day is spent either at home entertaining guests or out visiting family and friends.



Kavadis during Thaipusam, Kuala Lumpur Malaysia. **Source:** [articlesbase.com](http://articlesbase.com)

**Thaipusam**, is a Tamil festival that takes place on the full moon day in the 10<sup>th</sup> Tamil month of Thai. This festival draws many onlookers as some devotees practice a form of penance by piercing their cheeks with *vels*, a long metal rod shaped like a lance, and by piercing their chests and backs with hook-like needles. Participants display no pain and no bleeding, and are usually in a trance-like state. In Kuala Lumpur, up to one million people are present to either participate in or to watch the festivities. A silver chariot followed by thousands of devotees leaves downtown Kuala Lumpur to make the 15 km walk to the Batu Caves, where devotees will then climb the 272 steps to enter the cave that houses a temple devoted to Lord Murugan, in order to offer *kavadis* (a physical burden that the devotee carries; some are as large as a portable altar or as small as a jug of milk). Along the route, coconuts are broken purifying the route and fruits are offered to the Gods. Leading up to Thaipusam, many observe a vegetarian diet and practice meditation and prayer.

**Mooncake Festival or Mid-Autumn Festival or Lantern Festival**, is a Chinese festival that historically celebrated the harvest but was traditionally meant for women to worship Chang-Er, the moon goddess. Mooncake, a cake filled with sweet red bean paste, white lotus seeds or lotus seed paste, and a whole egg yolk, are enjoyed in the month leading up to the festival. On the evening of the festival, lanterns are lit and mooncakes, mini yams, and round fruits are offered to Chang-Er.



Colourful mooncakes for Mid-Autumn Festival. **Source:** [travelmalaysia.com](http://travelmalaysia.com)



## Meal Style

It is common for Malaysians to eat at least four times a day (breakfast, lunch, tea, and dinner), while some may consume many small meals. The meals usually consist of rice and a balance between vegetables and protein (the protein varies depending on the ethnicity and religious beliefs of the consumer). Meals prepared at home are still viewed as the healthier option and many households, especially those in rural areas, will choose to cook at home. Older Malaysians continue to cook traditional meals, while the younger population seeks convenience and prefers quicker and simpler options such as noodles, fried rice, or soup. Demand for packaged and prepared foods is also increasing as they offer less preparation time and maintain a longer storage life.

Other strong players in foodservice are the *mamak* and *kopitiam* stalls. Also referred to as “hawker stalls” or street food vendors, they are a common sight throughout Southeast Asia. These are open-air quick-service restaurants where one can enjoy traditional fares such as beef rendang, laksa, char kway teow, mee goreng, roti canai, among many other options. It is a very popular option as it provides consumers with local meals in a quick and affordable setting. Typically these stalls are open 7 days a week, from early morning to late at night; some even operate 24 hours a day.

## Cuisine\*

Malaysian cuisine is where the many cultures of the country are showcased. Although the various culinary styles can be traced to a particular ethnic group, each style also has its own Malaysian identity that reflects the influences of other ethnic groups.

**Malay Cuisine** is attributed to the Malay population of the country and has a few different styles that can be distinguished within it. These are:

- ▶ **masak\*\* lemak**, “lemak” literally translates to “fat” but in cooking, refers to the richness of a coconut-based cooking style. For example, *nasi lemak* is a coconut flavoured rice dish where the rice is cooked with coconut milk and pandan leaves (screwpine leaves) and is served with *sambal ikan bilis* (dried anchovies in a dry *sambal* sauce), sliced cucumbers, hard-boiled egg and roasted peanuts.
- ▶ **masak pedas**, “pedas” translates to “hot” or “spicy” and refers to a sambal or hot chillies-based style. For example, *beef rendang* is a dry spiced coconut beef dish that is popular throughout the country. This dish is always present at special occasions such as weddings, and it takes centre stage during Eid, at the end of Ramadan. During the festival season, it is served with *lemang*, a rice cake made of glutinous rice and *santan* or coconut milk. The rice is put into a bamboo pole lined with banana leaves, and cooked over a low open fire.
- ▶ **masak assam**, “assam” translates as “sour” and refers to a tamarind-based style. For example, *laksa* is a tangy fish noodle soup. Thick rice noodles are the base of this dish, served in a tangy, tamarind-based fish soup and garnished with cucumber, lettuce, pineapple, onion, and mint leaves. This dish is available throughout the country with regional variations slightly changing its taste.



A typical 24 hour mamak stall  
Source: allmalaysia.info



A more modern mamak stall in Kuala Lumpur  
Source: CIA World Factbook



Above: Beef Rendang  
Source: rasamalaysia.com



Below: Nasi lemak  
Source: allmalaysia.com

\* Unless otherwise noted, all information in this section was derived from Malaysian Food, 2011

\*\*“masak” means “to cook” in Malay





- ▶ masak merah, “merah” translates as “red” and refers to a tomato-based sauce style. For example, *ayam masak merah* is similar to chicken cacciatore, however, what sets it apart is its hotness derived from the spicy tomato sauce in which the chicken is cooked.
- ▶ masak hitam, “hitam” translates as “black” and refers to a dark and sweet soy sauce-based style. For example, *daging masak hitam* is a sweet and slightly sour beef dish made by blending dark soy sauce, tamarind juice, ginger, lemongrass, and turmeric into a sauce in which beef strips are cooked.
- ▶ masak assam pedas, refers to a spicy and sour flavoured tamarind and *sambal* or hot chillies-based style. For example, *sambal sotong*, a spicy dish consisting of squids cooked in a blend of chillies, shallots, garlic, stewed tomatoes, tamarind paste, and *belacan*, a dried shrimp paste made from tiny brine shrimp that have been processed by sun-drying and aging, then formed into a block or cake. Belacan is found in many Malaysian, Indonesian and Thai dishes. Although incredibly fragrant, its scent diminishes when cooked.

Malay desserts are enjoyed by many throughout the country and are especially present during the Malay festival of Hari Raya Puasa. Some of these desserts include *onde onde*, small round glutinous rice balls flavoured with pandan leaves essence, filled with *gula Melaka* (Malaccan sugar or a substitute such as palm sugar), and rolled in fresh grated coconut; and *kuih talam*, a two-layered coconut pudding made of rice flour, sago flour and steamed coconut milk (one layer is coloured green with the use of pandan leaves while the second layer remains white).



A variety of Malay kuih.  
Source: virtualmalaysia.com

**Nyonya Cuisine** is a reflection of this mixed ethnic group and its unique history. Nyonya food is recognized by the presence of carefully blended roots and spices such as lemongrass, galangal, turmeric, chillies, candlenuts, shallots, and belacan. This seasoning is made fresh by hand using a mortar and pestle. It also requires a long marinating process for the meats and seafood before they are cooked. Some examples of Nyonya dishes include:

- ▶ Chicken Kapitan, a Nyonya style chicken curry that utilizes tamarind juice, candlenut, fresh turmeric root, and the ever-present belacan.
- ▶ Kangkung Belacan, a popular vegetable dish. Kangkung is similar to spinach and in this dish it is stir fried with the delicate blend of chillies, dried shrimps, and belacan.
- ▶ Ayam Pongteh, a popular dish, especially among children. This dish is chili-free and the chicken is cooked with preserved soy beans, dark soy sauce, sugar, potatoes, shitake mushrooms, and a blend of onions, garlic and ginger.
- ▶ Babi Chin, a type of stewed dish made of pork belly, preserved soy beans, shitake mushrooms, bamboo shoots, dark soy sauce, a blend of shallots and garlic, and flavoured with coriander.

Another area where the mixed background of the Nyonya is visible is in their *kuih* (cake or dessert). These desserts are influenced both by the Malay and Chinese cuisines through the use of local ingredients such as sweet potatoes, yams, agar agar (seaweed jelly), gula Melaka, coconut milk, and glutinous rice, as well as Chinese ingredients such as red beans, green beans, and mung beans. Some examples of kuih are:

- ▶ Bubur Cha-Cha, a dessert made of cooked sweet potato, yams, sago pearls, coconut milk, and rock sugar.
- ▶ Cendol (pronounced chen-dol), a popular milky dessert served in a bowl. It is made of small strips of jelly made with rice flour and coloured with pandan leaves, sweet red beans, shaved ice, gula Melaka, and coconut milk. Other optional ingredients include glutinous rice, grass jelly, or even creamed corn.



Cendol  
Source: makan-moments.com



**Malaysian Indian Cuisine** reflects the influence of India since trade began in the Malayan Peninsula. It is not surprising that the present day Indian population is the third largest population in Malaysia. Spices are the main component of Indian cooking. These include coriander, cumin, turmeric, fennel, mustard, fenugreek, cardamom, clove, cinnamon, and star anise.



Roti canai with curry sauce

Source: [malaysian-food.blogspot.com](http://malaysian-food.blogspot.com)



Dosa or thosai, with curry sauce

Source: [1bestcuisineguide.com](http://1bestcuisineguide.com)

Indian cuisine in Malaysia can be separated into two different groups, north and south. North Indian meals are mainly comprised of wheat breads such as *chapati* or *roti* (unleavened bread) or *paratha* (fried unleavened bread), and a form of curry – vegetable (vegetarian) or meat-based. These curries are not extremely spicy and have a creamy texture because of the use of yoghurt or *ghee* (clarified butter). This creamier curry version is a form of cuisine called Mughlai cuisine, from the ancient Moghul Emperors of India. South Indian meals differ as they tend to be served with lighter breads such as *dosa* or *thosai* (thin rice pancakes), *vada* (a flat patty made of fermented rice and dhal), *appam* (rice pancake), and *idli* (steamed rice cake), as well as fish or vegetable-based dishes.

Some examples of Malaysian Indian dishes include:

- ▶ Nasi Biryani, a dish with a base of basmati rice sautéed in ghee, cooked with saffron, and served with pieces of spiced lamb, mutton, or chicken, slivered almonds and raisins. This dish is considered a delicacy as it uses saffron, the world's most expensive spice.
- ▶ Fish Head Curry, like its name indicates, a curry in which the head of a fish (usually a large grouper, cod, salmon, or red snapper) is cooked in fish curry powder with spices, chillies, tamarind, and coconut milk.
- ▶ Mee Rebus, a yellow egg noodle dish served with a sweet potato gravy and bean sprouts, and garnished with cooked squid, prawn fritters, boiled egg, fried shallots, and a squeeze of a local kalamansi lime.
- ▶ Roti Canai (pronounced Chan-nai), a flaky pancake that is fried and served with a side of curry for dipping.

A popular drink is Teh Tarik, which means “pulled tea”. This is a sweet milky tea that is prepared by pouring the hot tea from one mug to another several times to make it frothy.

**Malaysian Chinese cuisine.** Although the Chinese first arrived in Malaysia during the Ming Dynasty, it wasn't until the 1800s when tin became a viable economic source under the British, that the Chinese came in significant numbers. Like many other immigrant groups before them, the Chinese also lent their various culinary styles to what is now Malaysian cuisine. Many dishes still resemble those of the motherland, however it is not uncommon to find Chinese dishes that are unique to Malaysia, such as *Chili Crab*, a spicy dish where the crab is cooked in a chilli sauce. The diverse culinary styles of China can also be found in Malaysia, most notably:

- ▶ Cantonese, the most popular style of Chinese cooking, is most known for its quick stir-fry method and the importance of Yin (cooling elements such as vegetables, most fruits, and clear soup) and Yang (heat elements such as starchy foods and meat) in dishes. An example of Cantonese cuisine is *Dim Sum*, which means “to touch your heart”. This is consumed in a restaurant at lunch time or at dinner and entails 10-30 or more different dishes served either in small steamer baskets or on plates that are brought around to the dining tables on trolleys. Diners choose which items they would like and the bill is tallied based on the number of plates or baskets consumed. Some items include: *Siu Mai* (steamed pork and shrimp dumplings); *Char Siu* (roasted pork); *Chai Kueh* (steamed vegetable dumplings); *Dan Tat* (baked egg custard); and *Chee Chong Fun* (rice sheet rolls).



Dim Sum

Source: [touringmalaysia.com](http://touringmalaysia.com)





- ▶ Szechuan, is the fieriest of the Chinese cuisines, as illustrated by dishes such as *Ma Po Tofu*, a chilli tofu dish, and *Hot and Sour Soup*.
- ▶ Beijing, famous for its *Peking Duck*, is typically served with steamed buns or pancakes, as rice is not readily grown in the north of China.
- ▶ Hainan is more common in Malaysia as most Malaysian-Chinese are from the southern regions of China. Some particular dishes from the region include: *Hainanese Chicken Rice*, a popular everyday meal, that consists of slowly poached then cooled chicken served in bite-sized pieces with rice cooked in the broth, garnished with cucumbers, scallions, cilantro, and a side of spicy dipping sauce; and *Steamboat*, a dish similar to Japanese Shabu-Shabu, where thin slices of raw meat, seafood and vegetables are cooked at the table in a pot containing soup broth.
- ▶ Hokkien, usually perceived as being at the lower end of the Chinese food culinary scale, this style of cooking is famous for various dishes that are found throughout Malaysia. *Bak Kut Teh* is a herbal soup typically served at breakfast due to its invigorating qualities. It is composed of pork ribs that have been simmered in a soup of Chinese medicinal herbs, whole bulbs of garlic, and dried shitake mushrooms. Another common food is *Popiah*, a steamed rice paper roll filled with jicama root, carrots, bean sprouts, minced prawns, fried shallots, and lettuce, and served with a sweet and hot chilli sauce for dipping.
- ▶ Teochew is a delicate yet robust cuisine style. One of its more noted dishes is *Char Kway Teow*, a flat rice noodle dish combined with lard and shrimp, cockles, bean sprouts, egg and chives, stir-fried with a smoky chilli. This is one of the more popular dishes found at hawker stalls.
- ▶ Hakka, a style of cuisine most often sold at hawker stalls. One of the well-known dishes is *Yong Tau Foo*, a dish of deep-fried tofu stuffed with fish mousse then steamed or boiled, and served with dipping sauce.



Hainanese Chicken Rice  
Source: [recipemantra.com](http://recipemantra.com)

Chinese desserts are also quite popular. A common dessert that can be found throughout the year is *Ais Kacang*, or ABC. This is a favourite among locals and is a dish of sweet red beans, agar agar, barley pearls, sweet corn and fruits, served with shaved ice, rose syrup, brown sugar syrup, and sweetened condensed milk.

**Malaysian Eurasian Cuisine.** The Straits of Malacca were a part of the main Asiatic trade route, and Malacca, a natural harbour, was one of the major hubs: other major hubs include Goa in India and Hormuz in the Persian Gulf. This important trade location was colonized by various European powers, from the Portuguese in 1511, to the Dutch in 1641, and finally the British in 1824. The influence of these European occupations is still present in today's Malaysian Eurasian cuisine.

- ▶ Portuguese-influenced cuisine: *Devil curry* is a meat curry made with mustard powder, turmeric powder, vinegar, candlenuts, and copious amounts of chillies. *Pickled Salt Fish* is salted fish pickled in a blend of garlic, ginger, vinegar, spices, and tamarind, and is used as an accompaniment or chutney.
- ▶ Dutch-influenced cuisine: *Bergedel* are potato patties with ground beef, and originate from the Dutch-controlled islands of Batavia, in present day Indonesia.
- ▶ British-influenced cuisine: *Tuna Mornay* is a classic casserole dish of canned tuna covered in a creamy cheese sauce and then baked.
- ▶ Eurasian cuisine: *Pork Ribs Soup* is a soup dish made of pork spareribs that are simmered in an onion, cinnamon stick, clove, star anise and black peppercorn broth, and to which potatoes, carrots and sometimes cabbage and green beans are added.

Desserts include curry puffs, which are reminiscent of Spanish empanadas or Indian samosas. These puff pastries are filled with curried ground beef, potatoes, and peas, brushed with egg wash, and baked. Pineapple jam tarts are a pastry tart topped with homemade pineapple jam.



## ► TRENDS

### *Urbanization and Globalization*

#### **Convenience**

With a growing number of Malaysians living in urban areas, it is expected that the sale of convenient and time-saving items will rise. Young adults who have relocated to the cities for higher-level education and work will continue to lead this trend. The faster-paced city lifestyle will dictate what and how this group consumes. In terms of food, it is expected that ready-meals will continue to grow; however, not all segments of ready-meals will be in demand. Frozen and canned/prepared meals will continue to rise as they offer a quick alternative to homemade, or have the flexibility to be used as a time-saving base for more elaborate meals. Although it is important to speak to the more traditional dishes, when it comes to ready-meals, the window for growth may be small as foodservice outlets such as mamak stalls or kopitiams already provide quick alternatives to home-cooked meals. With increasing international influence, Malaysian consumers seeking a similar lifestyle may look to more Western or health-oriented options in the ready-meals sector (Euromonitor, 2010).

#### **Private Label**

Although the 2009 recession did not affect Malaysia as hard as other nations, its consumers were cautious in their spending and this trend continued through 2010. The sale of private label items was strong as consumers looked for smart and economical choices, alleviating the low-quality stigma placed on private labels as they helped people weather tougher economic times. The role that private label is playing in the Malaysian market is that of responding to consumer demands that are not being fulfilled by branded items. Retailers such as Tesco have launched various private label brands (Springforce, Daisy, All About Body, and Breakfast King) in response to changing consumer preferences. They utilize local, small and medium-sized enterprises in order to respond quickly to the latest trends. By creating their own private labels, retailers are also able to better control their brand's image as well (Euromonitor 2011).

#### **Lifestyle Concept**

In contrast to the rise of private label and correlated with the increased standard of living for the younger generations, the demand for premium brands rose in 2010 and will continue to grow as this group forms the majority of the population. Stores that typically served expatriates are now finding that young professional Malaysians are among their customers, as they search to acquire premium and imported goods. A part of this demand is the desire to define their lives through their purchasing choices (Euromonitor 2011).

#### *Organic Foods*

The organic food industry in Malaysia is still relatively new and underdeveloped. It began in the late 1990s with the emergence of "Mom and Pop" stores catering to a small percentage of cancer patients seeking healthier foods, as well as a large, predominantly Chinese, consumer base that is still present today (Country Farm Organics). Organic food is viewed positively, with Malaysian consumers believing that choosing organic food represents a decreased exposure to pesticides, antibiotics and hormones, and has an increased nutrient and antioxidant count (IFOAM); it is no wonder that these health-conscious, fresh-seeking consumers are now turning to organic foods.

#### **MALAYSIAN TELEVISION**

The tech-savvy younger population is influenced by the internet as well as satellite television. Even popular Malaysian television shows are blending both national and international influences together. Following a similar format to the USA's "American Idol" or Britain's "The X Factor", last year's most popular reality show was "Imam Muda" ("Young Leader"). It was viewed as a progressive television program, based on pop culture yet maintaining its cultural ties to the nation through its religious intent. In "Imam Muda", a contestant was chosen among ten young men as the one who would be the best imam, a cleric in the Islamic religion. The winner of the ten-week contest was awarded an all-expense paid pilgrimage to Mecca, a scholarship to a university in Saudi Arabia, as well as a job as a cleric in a Malaysian mosque, cash, a car and a laptop (Al Jazeera).



Since 2005, supermarkets have begun carrying full organic lines and have taken organic from its niche area to a more public space. Prices are not an issue for most consumers as organic food is perceived as bearing good value, with health benefits that outweigh the extra monetary cost (Shaharudin et al). The majority of domestic production is in fruits, vegetables, and rice. There is strong demand for temperate climate produce (apples, carrots, potatoes, broccoli, etc.) that the local farmers are not able to accommodate. This demand is met through a heavy reliance on imported goods from the U.S., Australia and New Zealand. The leading channel for foreign companies to enter the market is through distributors. Country Farm Organics, a company that specializes in the import and distribution of organic products in Malaysia, are also the official organic partner for supermarkets such as Jusco, Carrefour, and Cold Storage (Country Farm Organics).

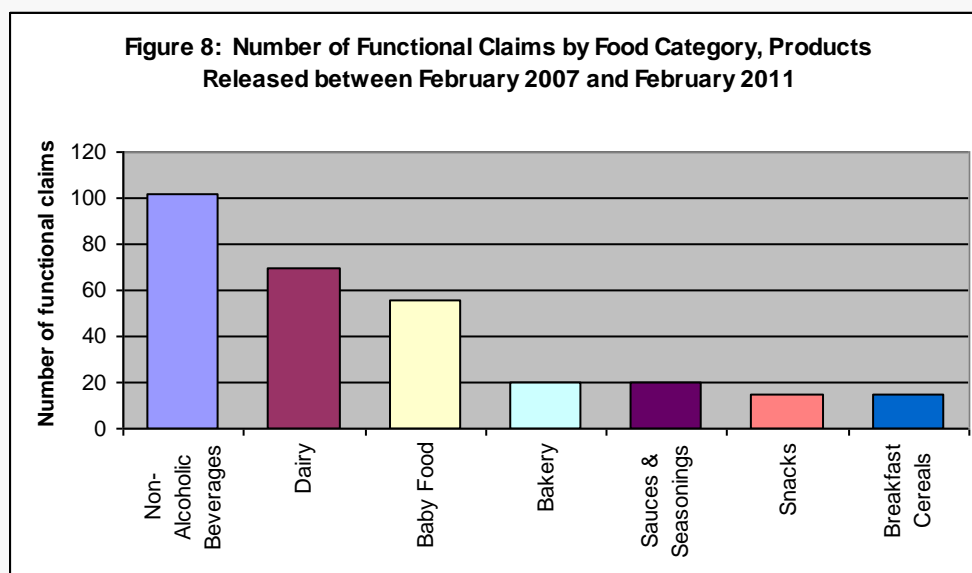


New organic products in the Malaysian market  
Source: Mintel, 2011

Certification on a national level is still in its infancy with the Department of Agriculture overseeing it through its Skim Organik Malaysia (SOM) program launched in 2005. Other certifications present in the market include the Institute for Ethics and Environmental Certification (ICEA) based out of Italy, the Organic Food Development and Certification Center of China (OFDC), the Organic Agriculture Certification Thailand (ACT), as well as the PT Biocertification Indonesia (BioCERT). However, the Malaysian government has yet to enforce rules around organic labelling, thereby leading to the continued liberal use of the word “organic” and related logos, leaving it largely up to the consumer’s trust of the product’s company (Country Farm Organics). As long as this trust is maintained through increased education for the consumer, and the organic goods being offered hold their promise of being healthy choices over the conventional products, the organic sector will continue to grow.

## Functional Foods

The definition of functional foods differs between countries, thus the working definition here will be the one used by the International Life Sciences Institute (ILSI): “[functional foods are] foods that have beneficial effects on body functions that go beyond adequate nutritional effects and are relevant to an improved state of health and well-being and/or a reduction of the risk of disease”.



Source: Mintel, 2011

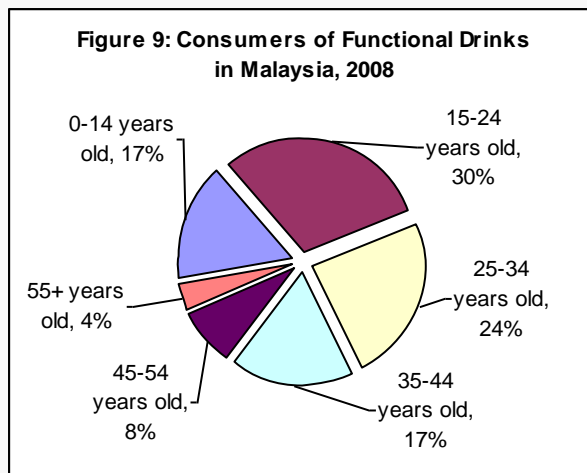


Within the ASEAN group, Malaysia has the strictest guidelines in terms of functional claims product labelling. Health claims include: nutrient content claims, nutrient comparative claims, nutrient function claims, and reduction of disease risk claims. All of these claims, except for the latter, are permissible in Malaysia. However, even within the permissible claims there are limitations as only 52 nutrient claims are allowed and there is a rigorous process on the national level if additional claims are requested (ILSI).

According to the Malaysian Industrial Development Authority, consumer demand for functional and healthy foods has grown due to increased awareness of nutritional value and fortification of foods (MIDA). The chart on the previous page shows the sectors where new product introductions have been most prominent (Figure 8), and the chart at right illustrates the age categories of consumers of functional drinks (Figure 9). The majority of the growth has been in the non-alcoholic beverages sector which includes energy drinks and vitamin-fortified water, two products that are very popular with the teen and young adult populations.

### Environment

Product claims vary and include animal friendly, environmentally friendly, organic, pesticide-free, etc. Like many other nations, the largest growth in food product launches has occurred in the organics sector (Figure 10). However, awareness in Malaysia surrounding any form of eco-labelling is still in its infancy. In order for marketing strategies based on the environment to succeed, an educational program on the purpose of eco-labels, as well as a clearer understanding of what an eco-label means, will be crucial. The Malaysian consumer is open to choosing an eco-friendly product however, a lack of knowledge (i.e. which products are eco-friendly) stops them from purchasing these products (Rashid et al). Green marketing is still new in Malaysia but with the growing, educated, and internationally-influenced young working population, this market is expanding at a quickening pace. Awareness of the negative impact of global demand for palm oil on indigenous species, is also becoming increasingly apparent (see below).



Source: Datamonitor, 2011

### The Bornean orangutan (*Pongo pygmaeus*)

From the Malay words for man “orang” and forest “utan”, comes the name for the largest tree-dwelling mammal. There are two remaining species of orang-utans in the world and both make the rainforests of Indonesia and Malaysia their home: the Bornean orangutan (*Pongo pygmaeus*) and the Sumatran orangutan (*Pongo abelii*). The Bornean orangutan lives in one of the most bio-diverse areas in the world, the Malaysian regions of Sabah and Sarawak. With a population estimated at 12,300, this “man of the forest” is globally classified as endangered as its population is vulnerable to habitat loss, illegal poaching and natural disasters such as drought and forest fires. In recent years, the conversion of lowland rainforests to palm oil plantations has further exacerbated their population decline for two main reasons: first, they are fruit eaters and require availability of a variety of fruits; and second, they are arboreal animals who sleep each night in a nest made up of twigs and branches at a height close to 2 storeys above ground, therefore a decrease in varied forests is limiting to their population. Conservation areas are established throughout the region however, the increased international demand for palm oil (used in cooking, cosmetics, mechanics, and as bio-diesel) makes it more difficult to preserve fertile land for these apes when economic gain is at stake (World Wildlife Foundation).

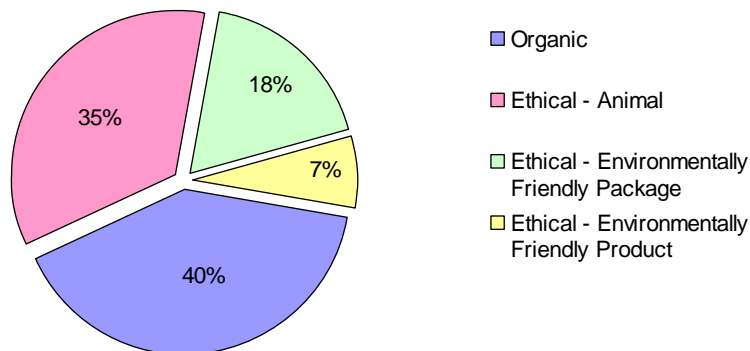


Source: malaysia-maps.com 2011





**Figure 10: Eco-Friendly Product Launches between February 2007 and February 2011**



Source: Mintel 2011, Ethical Products

## Halal

With a Muslim population totalling close to 17 million people and with nearby Indonesia's Muslim population totalling close to 209 million people, it is not a surprise that the halal market in the region is currently expanding (CIA World Factbook; Malaysia and Indonesia). According to the Malaysian Industrial Development Authority (MIDA), the nation's halal certification is globally recognized. As a result, Malaysia is poised to become a key player for halal regional production in both meat and non-meat sectors (MIDA). Its global Muslim market is valued at an estimated US\$547 billion per year, for a population of 2 billion. Malaysia alone has a halal food market value that has grown from US\$6.6 billion in 2005, to US\$8.4 billion in 2010 (World Halal Forum). According to Mintel, there were 334 new products with the halal claim that entered the Malaysian market between January 2010 and March 2011 (Tables 2 and 3).

For additional information on the global halal market, please refer to Agriculture and Agri-Food Canada's *Global Pathfinder Report: Halal Foods* (April, 2011).



Source: Mintel 2011

**Table 2: New products with halal claims, introduced to the Malaysian market between January 2010 and March 2011 -Category breakdown**

Product Category	Number of Variants
Non-Alcoholic Beverages	57
Bakery	51
Snacks	48
Sauces & Seasonings	39
Side Dishes	22
Dairy	19
Processed Fish, Meat & Egg Products	18
Sugar & Gum Confectionery	13
Breakfast Cereals	12
Meals & Meal Centers	12
Sweet Spreads	12
Fruit & Vegetables	10
Chocolate Confectionery	8
Baby Food	5
Desserts & Ice Cream	4
Soup	4

Source: Mintel 2011



**Table 3: New products with halal claims, introduced in the Malaysian market between January 2010 and March 2011  
-Sub-category breakdown**

Category	Sub-Category	Number of Variants
Bakery	Sweet Biscuits/Cookies	28
Side Dishes	Rice	14
Non-Alcoholic Beverages	Fruit/Flavoured Still Drinks	13
Sauces & Seasonings	Table Sauces	13
Bakery	Savoury Biscuits/Crackers	11
Processed Fish, Meat & Egg Products	Fish Products	11
Non-Alcoholic Beverages	Coffee	9
Snacks	Corn Based Snacks	9
Sauces & Seasonings	Seasonings	8
Bakery	Cakes, Pastries & Sweet Goods	7

Source: Mintel, 2011



Source: Mintel, 2011

## Technology

### Online Shopping

Online shopping, or internet retailing, is an area that has a lot of potential for growth due to increased internet access both from consumer demand and government initiatives. According to a Mastercard survey, 50% of Malaysians made purchases online in 2010 (Jayaraman). Online shopping provides convenience as one can browse the internet for the best deals, as well as research consumer reviews on the product prior to purchase. It adds further convenience as the consumer has the opportunity to shop at any time; it also takes away the need to look for parking at a shopping centre, the chance of getting stuck in traffic, or having to navigate public transportation. As broadband internet enters more rural areas, this will also provide rural consumers the opportunity to purchase items that are typically only found in urban centers and that they might not have access to for a variety of reasons (e.g. too far from an urban center, or lack of transportation, lack of free time, among others). Internet retailing is most successful in non-food sectors as Malaysians will still prefer to purchase food items directly from stores where they are able to hand-select the quality of their food. The major sectors that will perform well with internet retailing are electronics, clothing and footwear, as well as beauty and personal care (Euromonitor, 2011). However, as with many other consumers around the world, there still exists a fear of identity theft through online shopping. In order to combat this apprehension, retailers will need to inspire consumer confidence by ensuring them that their personal data is being protected when shopping online.





## Internet and Satellite Television are Expanding Markets

Until recently, the focus of most retailers has been on the burgeoning capital city of Kuala Lumpur. However, in recent years, other urban centres have begun to grow and through the expansion of the internet and satellite television, these consumers are well aware of international trends and are also demanding access to these brands. These secondary states, namely Johor and Penang, are experiencing a growth in their permanent populations through urbanization, as well as increased tourist traffic by Vietnamese and Chinese visitors, as these neighbouring nations are also experiencing increased affluence among their younger generations (Euromonitor, January 2011).

### ► CONCLUSION

Malaysia is a complex nation, home to a population of diverse ethnicities and one that is quickly adapting to the opportunities of the world's interconnectedness. Changing from a middle-income country to a high-income country is a large step for this country to take, but an important one that Malaysians are working rapidly to achieve.

The young and tech-savvy population is increasingly educated with growing income levels, and is shaping consumer demand. It is important to note that the various traditional values of this nation are not to be overlooked; it is clear that Malaysians are proud of their varied heritages, and they will continue to blend new international influences with their own values in order to maintain their distinct identity.

With its large Muslim population, Islamic values remain important drivers of products in Malaysia. It is expected that the halal market will maintain its expansion beyond the food sector and further into the non-food sector. As the government continues to focus on Islamic funding through foreign direct investment, the Malaysian halal market could open more doors to the Islamic world.

Urbanization persists in shaping how Malaysians shop, as they keep looking for quality and convenience. Furthermore, with increased life expectancy, it is to be anticipated that demand will grow for healthy products as well as products aimed at the older population.

Malaysia's current growth from developing to developed nation poses challenges to the government, particularly in the areas of health, education, and technology. Therefore products that can aid in addressing these issues may also resonate with consumers.

The possibilities of this burgeoning country are endless, and with a stable government combined with a young and educated population, the "Malay Tiger" is poised to be a key player in this changing, globalized world. In order for Canadian products to seize these potential market opportunities, it will be important that they reflect the demands for quality and convenience that resonate with the broader food demands of today's Malaysian consumer.

### ► ADDITIONAL AAFC PUBLICATIONS

Agriculture, Food and Beverage Sector Profile – Kuala Lumpur, Malaysia – *May 2010*  
[<http://www.ats.agr.gc.ca>]

Agri-Food Past, Present, & Future Report – Malaysia – *February 2010* [<http://www.ats.agr.gc.ca>]

Global Pathfinder Report: Halal Food Trends – *April 2011*.  
[<http://www.marquecanadabrand.agr.gc.ca/research-etudes/research-etudes-eng.htm>]

Foodservice Profile: Malaysia – *Forthcoming*



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Toward Food Products**

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