



The Future of Retailing in Malaysia to 2018

Comprehensive data overview of the market, with retail sales value and forecasts to 2018

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Summary

"The Future of Retailing in Malaysia to 2018" is based upon an extensive, cross-country, industry research program which brings together Conlumino's research, modelling, and analysis expertise in order to develop uniquely detailed market data. It provides detailed quantitative analysis of past and future trends - crucially providing retail sales data not just by channel and by product, but showing product sales through different channels. This allows marketers interested in retailing to determine how to account for the development of retail trade overall and to know which channels are showing growth for which products in the coming years.

Data sets are provided for 2008 through to 2018, with actuals being provided from 2008-2013. All initial market sizing and analysis is conducted in local currency in order to ensure local trends are reflected in the data before conversion into other currencies.

Key Findings

- General retailers hold the largest share of retail sales in 2013, and will continue to dominate the market in 2018
- Online channel is set to post a double digit growth in the forecast period, 2013–2018, followed by duty free retailers.
- Cosmetics and toiletries and Apparel, accessories, luggage and leather goods are expected to grow the fastest over the next five years

Reasons to Buy

- "The Future of Retailing in Malaysia to 2018" is a detailed databook providing comprehensive analysis of the category and channel trends in the Malaysia retail market. Also helps to know the share of sales between different products in key channels and how this will develop
- The report provides both qualitative and quantitative insights of the changing retail dynamics across various product segments across different channels; with in-depth analysis of 26 product categories and 17 retail channels.
- This report provides detailed data on the size and development of retail sales of individual product types through specific retail channels and formats in Malaysia. It provides a detailed and comprehensive quantitative analysis of the trends affecting market development through both historic and forecast data.

1. Malaysia Retail Sales Overview

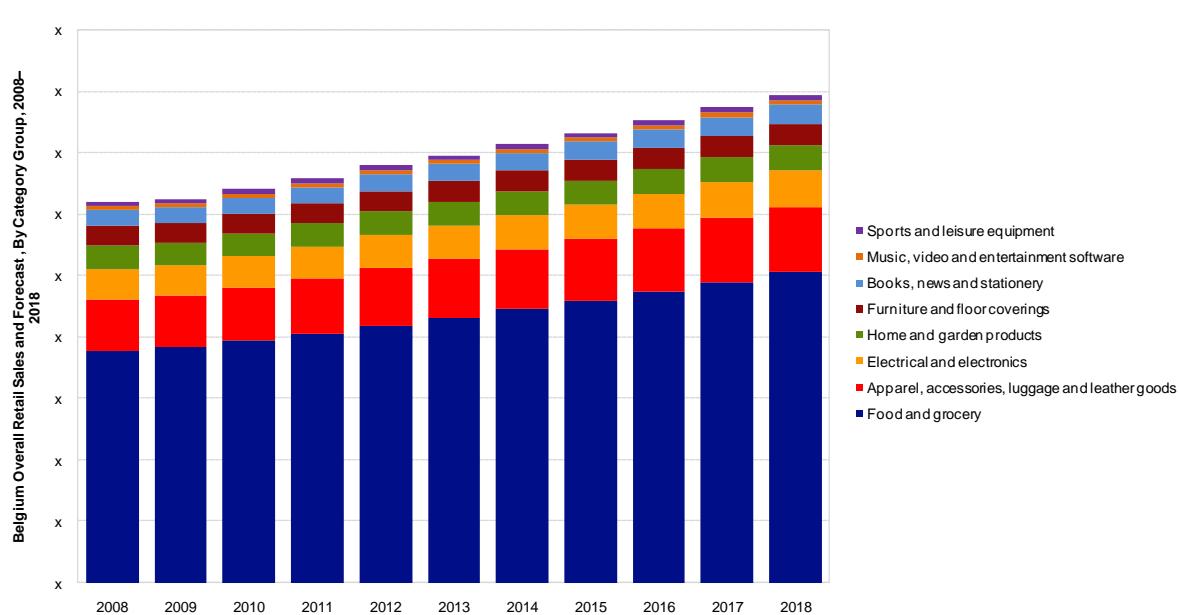
This section of the report provides an insight into Malaysian retail sales at channel level. It considers four key channel groups: online, specialist retailers, general retailers and value retailers.

Data is presented in three ways: at overview level, by breaking down each channel group by the channels that it is made of, and by breaking down each channel by the category groups that are sold through it.

1.1 Retail Categories Overview

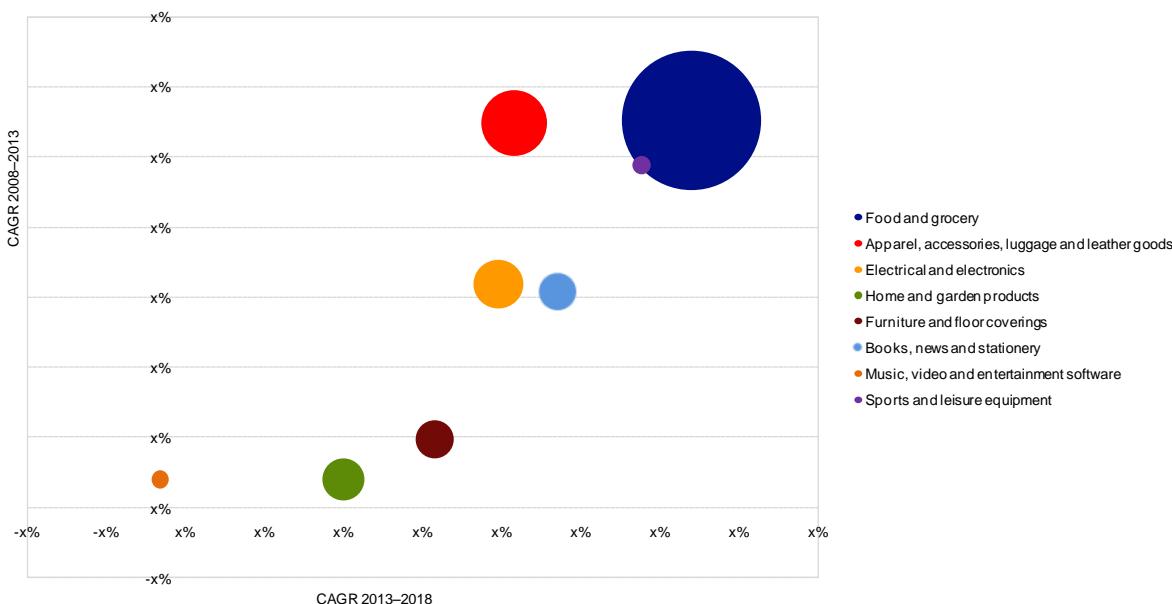
In 2013, food and grocery was the largest category group accounting for x% of total Malaysian retail sales, which represented a value of MYRx billion. Food and grocery was the fastest-growing category group during the review period, registering a CAGR of x% and is expected to remain so during the forecast period with a CAGR of x%.

Figure 1: Malaysia Overall Retail Sales and Forecast (MYR bn), by Category Group, 2008–2018



Source: Conlumino

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Figure 2: Malaysia Overall Retail Market Dynamics, by Category, 2008–2018


Source: Conlumino

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Table 1: Malaysia Overall Retail Sales (US\$ bn), by Category Group, 2013–2018

Category group	2013	2014	2015	2016	2017	2018	CAGR (%) 2013 – 2018
Food and grocery							
Apparel, accessories, luggage and leather goods							
Electrical and electronics							
Home and garden products							
Furniture and floor coverings							
Books, news and stationery							
Music, video and entertainment software							
Sports and leisure equipment							
Overall							

Source: Conlumino

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2. Category Group Analysis: Apparel, Accessories, Luggage and Leather Goods

This chapter considers the Malaysian apparel, accessories, luggage and leather goods category group. Data is presented by breaking down the group by the categories it is made of, and the channels the category group is sold through.

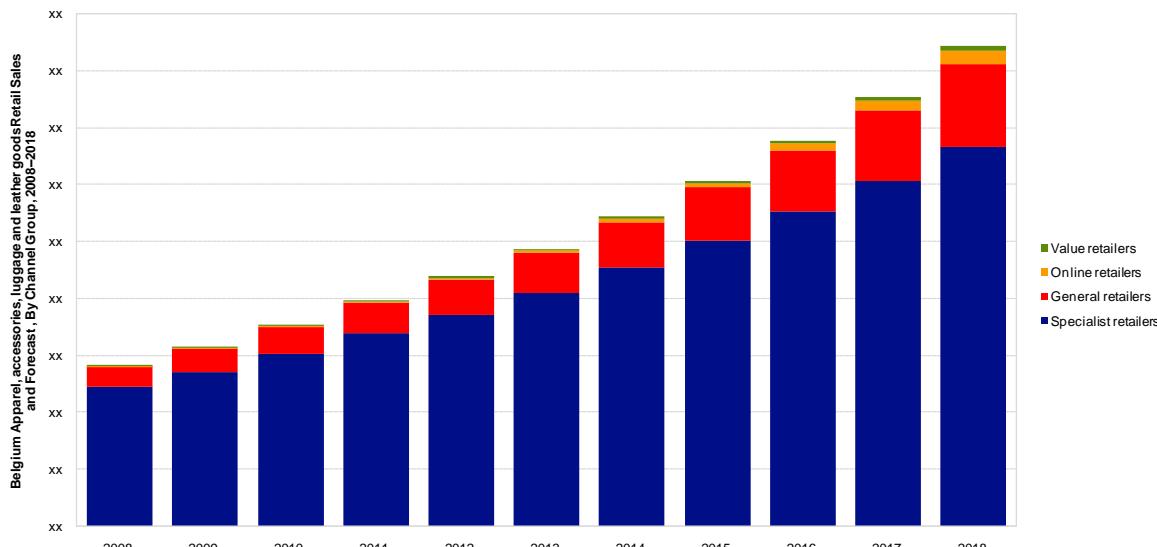
2.1 Apparel, Accessories, Luggage and Leather Goods Category Overview

2.1.1 Apparel, Accessories, Luggage and Leather Goods by Channel

The apparel, accessories, luggage and leather goods product category, contributed x% towards total retail sales, in 2013, registering retail sales of MYRx million. The category group is expected to grow at a pace of x% during the forecast period, and register retail sales of MYRx million in 2018.

Specialist retailers formed the dominant sales channel, with retail revenues of MYRx million selling x% of the product category in 2013.

Figure 5: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018



Source: Conlumino

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3. Channel Group Analysis: General Retailers

This chapter considers the Malaysian general retailers channel group. Data is presented by breaking down the group by the channels it is made of, and the category groups that are sold through the channel.

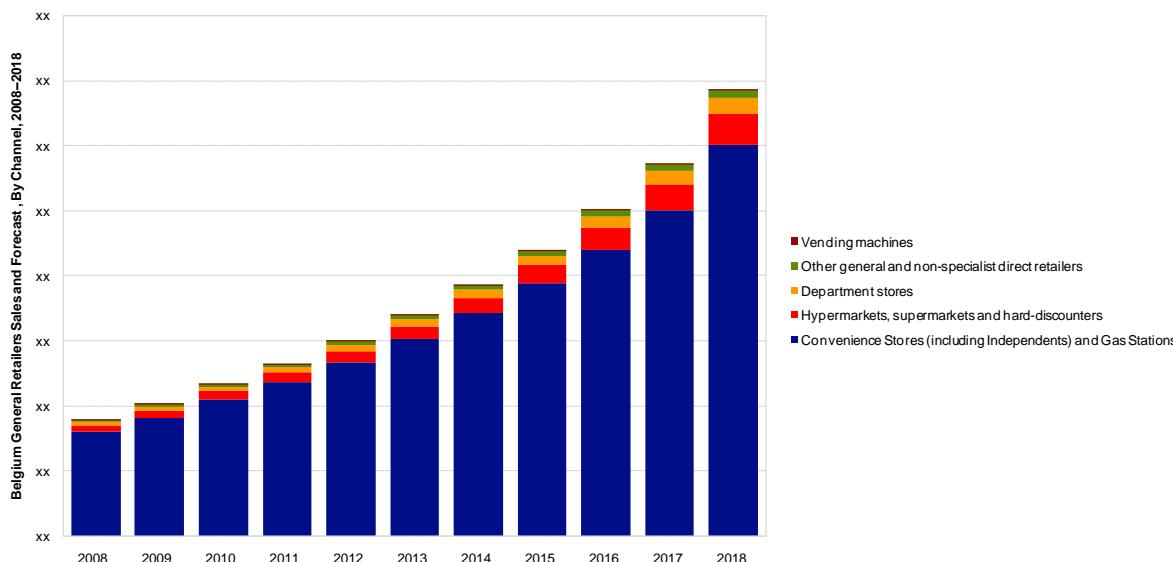
3.1 General Retailers Overview

3.1.1 General Retailers by Channel

General retailers registered sales revenues of MYRx million in 2013, with a contribution of x% towards total retail sales. During the review period, the channel grew at a CAGR of x% and is expected to record a CAGR of x% during the forecast period.

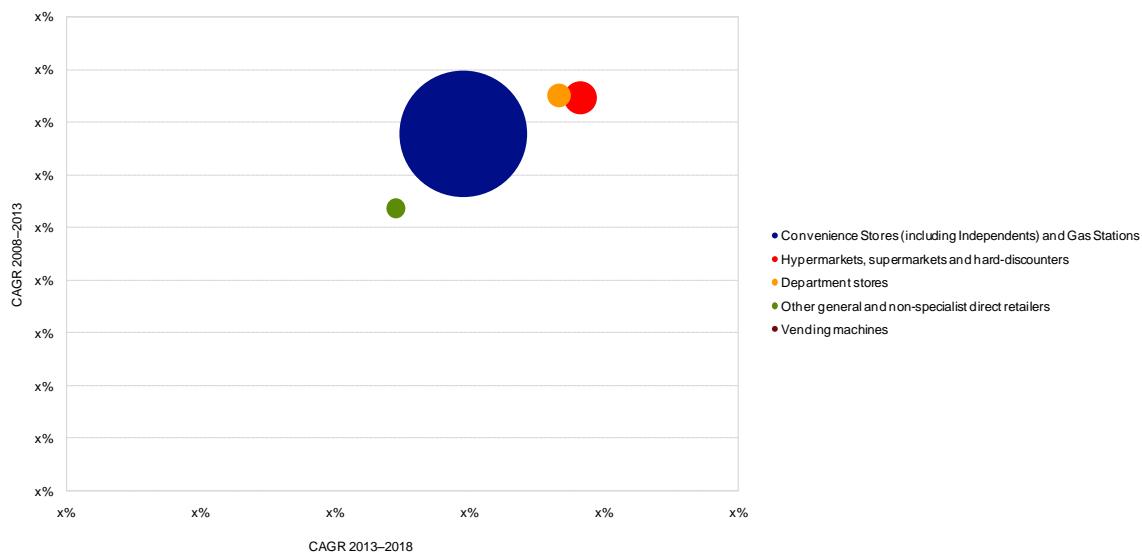
Convenience Stores (including Independents) and Gas Stations was the largest channel contributing x% towards the channel group revenues in 2012, with sales of MYRx million, which is expected to reach MYRx million by 2018. Hypermarkets, supermarkets and hard-discounters followed with a share of x% or MYRx million in 2013, which is projected to reach MYRx million during the forecast period.

Figure 68: Malaysia General Retailers Sales and Forecast (MYR mn), by Channel, 2008–2018



Source: Conlumino

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Figure 69: Malaysia General Retailers Market Dynamics, by Channel, 2008–2018


Source: Conlumino

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Table 236: Malaysia General Retailers Sales (MYR mn), by Channel, 2013–2018

Channel group	2013	2014	2015	2016	2017	2018	CAGR (%) 2013 – 2018
Convenience Stores (including Independents) and Gas Stations							
Hypermarkets, supermarkets and hard-discounters							
Department stores							
Other general and non-specialist direct retailers							
Vending machines							
Overall							

Source: Conlumino

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Summary Methodology

Overview

All data in this series of retail reports from Conlumino is rigorously sourced using a comprehensive, standardized methodology. This methodology ensures that all data is thoroughly researched and cross-checked against a number of sources and validation processes. At the core of this methodology is a triangulated market sizing approach, which ensures that results from different sources and approaches, including Conlumino's own industry surveys, are compared and a final consensus number between these inputs is derived. In addition, standardized processes and quality controls across the entire data collection, analysis and publication process ensure compliance and cross-checking of the data occurs at each stage of the methodology.

The triangulated market sizing method

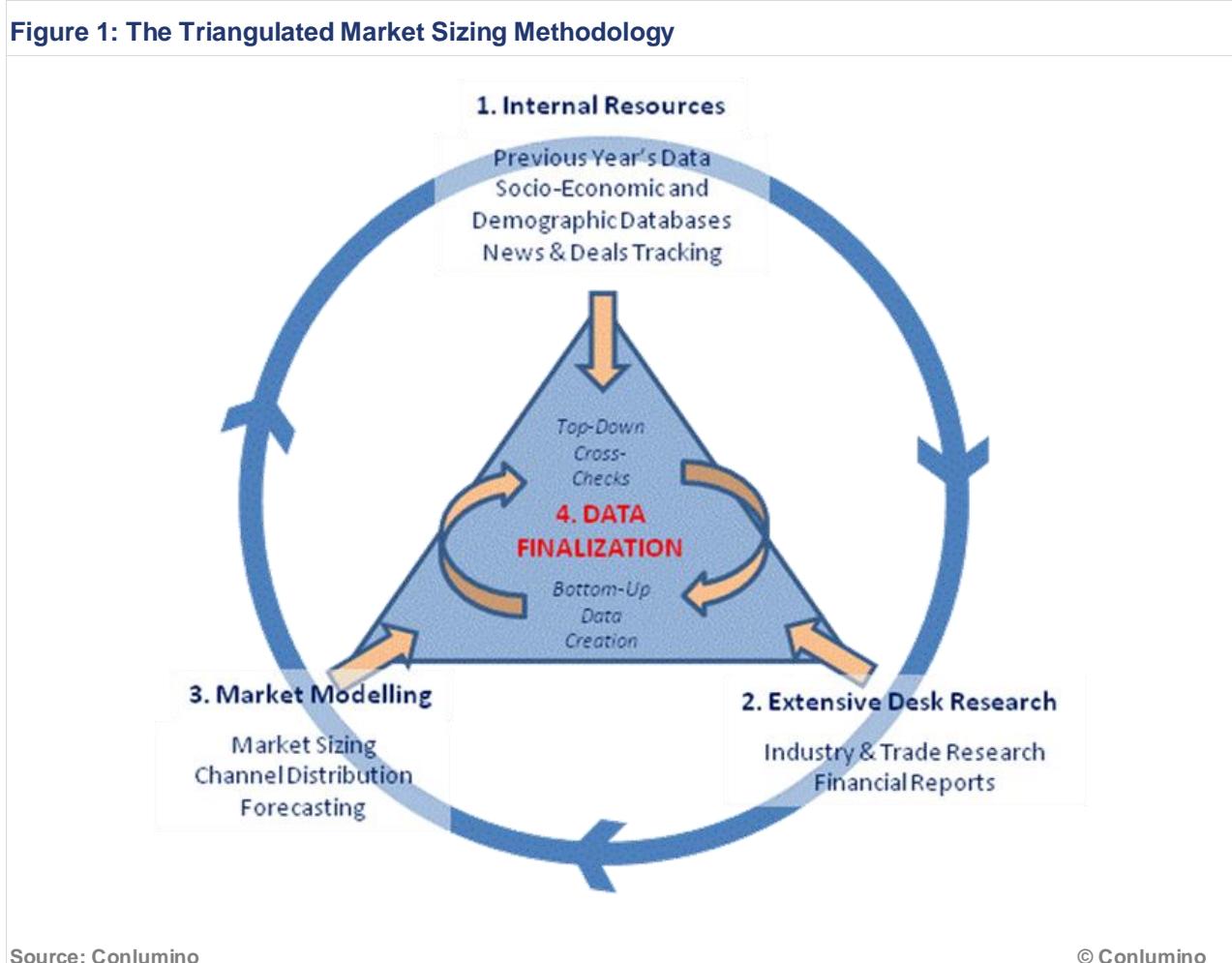
The triangulation method ensures that the results from three distinct phases of the research are brought together and cross-compared before finalized market numbers are derived:

1. **Existing internal resources:** as retail data is compiled using a rolling annual program of industry research, the first stage of producing the data is to review the existing internal information, both from the last major data release, as well as that which has been collected on an ongoing basis throughout the year. This includes inputs about market as well as individual retailer performance. These sources are then reviewed and incorporated into data collection processes and databases before the second intensive phase of desk research.
2. **Extensive desk research:** this phase of the methodology incorporates the main phase of secondary research. This research is initially conducted across a wealth of information sources, as listed below. In addition, the results of any relevant surveys from other Conlumino projects are also fed into data collection sheets. Online industry surveys can include industry opinion surveys of retailers' — and their suppliers' — sentiment and consumer surveys of purchasing and retail behavior. Secondary sources include, but are not limited to, the following:
 - a. Industry surveys
 - b. Industry and trade association research
 - c. Trade portals
 - d. Company filings and analyst presentations
 - e. Broker and investment analyst reports
 - f. International organizations
 - g. Government statistics
 - h. Retail media
 - i. National Press, including both business and consumer titles
3. **Market modeling:** the next stage in the process is to feed the results of the above into market models, which also include drive-based forecasting tools — which analyze drivers such as disposable income, product uptake, macro-economic drivers and market momentum — in order to fill in any gaps in the data and update forecast numbers. At this stage, the market models also look to update channel distribution data sets. For example, information

found at the research and trend monitoring stage on online retail sales would directly affect the channel distribution models.

4. **Data finalization:** the final stage of the process is the true triangulation of all the previous inputs. At this stage data is created using the inputs to hand in a bottom-up fashion, starting with the inputs from each of the previous three stages of the process for each data point to be published. This is done for all the product, channel and country combinations covered in the data. At this stage, therefore, the project analysts are constantly evaluating and deciding upon the relative merits of each of the inputs from the research processes. Once a triangulated set of data has been finalized, these outputs are then thoroughly cross-checked using a series of top-down checks which review the data against a series of reference benchmarking, including known overall retail sizes, growth trends and per-capita spending rates.

Figure 1: The Triangulated Market Sizing Methodology



Source: Conlumino

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Industry surveys in the creation of retail market data

Stage 2 of the above process includes using the outputs of Conlumino's surveys of consumers' packaged goods consumption and industry opinion. Every year Conlumino completes a large scale survey, with over 120,000 responses, covering CPG purchasing and consumption habits in 10 core retail markets around the globe. This major study, cross-referenced against the primary telephone research of product market sizes by country, provides outputs against which relevant retail market data, focusing on the grocery channel and core products in this channel are assessed. It should be noted that overall, this feeds research into 3 of the 25 product categories covered. In addition, any other suitable surveys conducted by Conlumino which also provide information on retail markets are mined for information to be put into the data finalization process.

Quality control and standardized processes

Crucial to the function of the above method is the adoption of strict definitions for all products and channels, and adherence to a standardized process at each and every stage in the methodology. By following this approach all data is made cross-comparable across countries to ensure that analysis adds to the understanding of market dynamics and trends.

The key elements of this approach are:

- **Strict channel definitions:** the definition of each channel is the same in every country;
- **Strict product definitions:** the definition of each product is the same in every country;
- **Standardized processes:**
 - **Data capture** – all data received as part of the research is captured in standardized files and in a standard format. Any workings that analysts carry out on inputs, for example to correct for misalignment in category coverage, are also covered in these sheets
 - **Data creation** – all modeling and forecasting approaches are standardized in order to ensure consistency
 - **Finalization and verification** – systematic methods and approaches are used to finalize data points
- **Country by country research structure:** all research is conducted country by country in order to ensure that market data reflect local market trends and contexts
- **Data checks during “bottom-up” creation:** during the data creation and finalization stage analysts refer back to initial sources and inputs in order to ensure accuracy in the data
- **Top down data audits and cross-checks:** a large series of cross-checks across all the different dimensions of the final data sets are run in order to identify any outliers or trends that do not fit with Conlumino's market understanding, as well as to conduct specific analyses against set proofing criteria, such as abnormal growth rate changes, verifying data at both the overall and detailed level against research inputs and checking per capita spends against other analysis of consumers' spending in a country
- **Hierarchical review processes:** finally, all of the above processes are subject to a hierarchical review process which ensures that not only the core analysts within a team look at the data, but that at each stage data is passed through several management layers in order that queries and data review and sign-off are completed before any final data can be published

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The Future of Retailing in Slovakia to 2018

The Future of Retailing in the Czech Republic to 2018

The Future of Retailing in Egypt to 2018

The Future of Retailing in Poland to 2018

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Table of Contents

1. Introduction	15
1.1 What is this Report About?.....	15
2. Malaysia Retail Sales Overview	16
2.1 Retail Categories Overview	16
2.2 Retail Channels Overview	22
3. Category Group Analysis: Apparel, Accessories, Luggage and Leather Goods	26
3.1 Apparel, Accessories, Luggage and Leather Goods Category Overview	26
3.1.1 Apparel, Accessories, Luggage and Leather Goods by Channel	26
3.1.2 Apparel, Accessories, Luggage and Leather Goods by Category	30
3.2 Apparel, Accessories, Luggage and Leather Goods Category Analysis	34
3.2.1 Clothing and Footwear.....	34
3.2.2 Jewelry, Watches and Accessories	37
3.2.3 Luggage and Leather Goods	40
4. Category Group Analysis: Books, News and Stationery	43
4.1 Books, News and Stationery Category Overview	43
4.1.1 Books, News and Stationery by Channel	43
4.1.2 Books, News and Stationery by Category	47
4.2 Books, News and Stationery Category Analysis	51
4.2.1 Printed Media	51
4.2.2 Stationery and Cards	54
5. Category Group Analysis: Electrical and Electronics	57
5.1 Electrical and Electronics Category Overview	57
5.1.1 Electrical and Electronics by Channel	57
5.1.2 Electrical and Electronics by Category	61
5.2 Electrical and Electronics Category Analysis	65
5.2.1 Communications Equipment	65
5.2.2 Computer Hardware and Software	69
5.2.3 Consumer Electronics.....	72
5.2.4 Household Appliances	75
5.2.5 Photographic Equipment.....	78
6. Category Group Analysis: Food and Grocery	81
6.1 Food and Grocery Category Overview	81

6.1.1	Food and Grocery by Channel	81
6.1.2	Food and Grocery by Category	85
6.2	Food and Grocery Category Analysis	89
6.2.1	Drinks	89
6.2.2	Household Products	92
6.2.3	Packaged Food	95
6.2.4	Personal Care	98
6.2.5	Tobacco	101
6.2.6	Unpackaged Food	104
7.	Category Group Analysis: Furniture and Floor Coverings	107
7.1	Furniture and Floor Coverings Category Overview	107
7.1.1	Furniture and Floor Coverings by Channel	107
7.1.2	Furniture and Floor Coverings by Category	111
7.2	Furniture and Floor Coverings Category Analysis	115
7.2.1	Floor Coverings	115
7.2.2	Furniture	118
8.	Category Group Analysis: Home and Garden Products	121
8.1	Home and Garden Products Category Overview	121
8.1.1	Home and Garden Products by Channel	121
8.1.2	Home and Garden Products by Category	125
8.2	Home and Garden Products Category Analysis	129
8.2.1	Gardening and Outdoor Living	129
8.2.2	Home Improvement	132
8.2.3	Homewares	135
9.	Category Group Analysis: Music, Video and Entertainment Software	138
9.1	Music, Video and Entertainment Software Category Overview	138
9.1.1	Music, Video and Entertainment Software by Channel	138
9.1.2	Music, Video and Entertainment Software by Category	142
9.2	Music, Video and Entertainment Software Category Analysis	146
9.2.1	Games Software	146
9.2.2	Music and Video	149
10.	Category Group Analysis: Sports and Leisure Equipment	152
10.1	Sports and Leisure Equipment Category Overview	152
10.1.1	Sports and Leisure Equipment by Channel	152
10.1.2	Sports and Leisure Equipment by Category	156

10.2	Sports and Leisure Equipment Category Analysis	160
10.2.1	Sports Equipment.....	160
10.2.2	Toys and Games	163
11.	Channel Group Analysis: Value Retailers	166
11.1	Value Retailers Overview	166
11.1.1	Value Retailers by Channel	166
11.1.2	Value Retailers by Category	170
11.2	Value Retailers Channel Analysis	176
11.2.1	Cash and Carries and Warehouse Club Stores	176
11.2.2	Value, Variety Stores and General Merchandise Retailers	182
12.	Channel Group Analysis: General Retailers	188
12.1	General Retailers Overview	188
12.1.1	General Retailers by Channel.....	188
12.1.2	General Retailers by Category.....	192
12.2	General Retailers Channel Analysis	198
12.2.1	Convenience Stores (including Independents) and Gas Stations.....	198
12.2.2	Department Stores	203
12.2.3	Hypermarkets, Supermarkets and Hard-Discounters.....	208
12.2.4	Vending Machines	213
12.2.5	Other General and Non-Specialist Direct Retailers	219
13.	Channel Group Analysis: Specialist Retailers	225
13.1	Specialist Retailers Overview	225
13.1.1	Specialist Retailers by Channel.....	225
13.1.2	Specialist Retailers by Category	232
13.2	Specialist Retailers Channel Analysis	239
13.2.1	Clothing, Footwear, Accessories and Luxury Goods Specialists	239
13.2.2	Drug Stores and Health and Beauty Stores	245
13.2.3	Duty Free Retailers.....	251
13.2.4	Electrical and Electronics Specialists	257
13.2.5	Food and Drinks Specialists.....	263
13.2.6	Home Furniture and Homewares Retailers.....	269
13.2.7	Home Improvement and Gardening Supplies Retailers	275
13.2.8	Music, Video, Book, Stationery and Entertainment Software Specialists.....	281
13.2.9	Other Specialist Retailers	287
14.	Channel Group Analysis: Online Retailing.....	293
14.1	Online Retailing Overview	293

14.1.1	Online Retailing by Category	293
15.	Appendix	300
15.1	Definitions	300
15.1.1	This report provides 2013 actual sales; while forecasts are provided for 2013 – 2018..	300
15.2	Summary Methodology	305
15.2.1	Overview	305
15.2.2	The triangulated market sizing method.....	305
15.2.3	Industry surveys in the creation of retail market data	307
15.2.4	Quality control and standardized processes	307
15.3	About Conlumino	308
15.4	Disclaimer	308

SAMPLE PAGES

List of Figures

Figure 1: Malaysia Overall Retail Sales and Forecast (MYR bn), by Category Group, 2008–2018	16
Figure 2: Malaysia Overall Retail Market Dynamics, by Category, 2008–2018	17
Figure 3: Malaysia Overall Retail Sales and Forecast (MYR bn), by Channel Group, 2008–2018	22
Figure 4: Malaysia Overall Retail Market Dynamics, by Channel, 2008–2018.....	23
Figure 5: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	26
Figure 6: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Market Dynamics, by Channel Group, 2008–2018	27
Figure 7: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (MYR mn), by Category 2008–2018.....	30
Figure 8: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Market Dynamics, by Category 2008–2018 ..	31
Figure 9: Malaysia Clothing and Footwear Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	34
Figure 10: Malaysia Jewelry, Watches and Accessories Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	37
Figure 11: Malaysia Luggage and Leather Goods Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	40
Figure 12: Malaysia Books, News and Stationery Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	43
Figure 13: Malaysia Books, News and Stationery Retail Market Dynamics, by Channel Group, 2008–2018.....	44
Figure 14: Malaysia Books, News and Stationery Retail Sales and Forecast (MYR mn), by Category 2008–2018	47
Figure 15: Malaysia Books, News and Stationery Retail Market Dynamics, by Category 2008–2018.....	48
Figure 16: Malaysia Printed Media Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	51
Figure 17: Malaysia Stationery and Cards Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	54
Figure 18: Malaysia Electrical and Electronics Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018 ...	57
Figure 19: Malaysia Electrical and Electronics Retail Market Dynamics, by Channel Group, 2008–2018.....	58
Figure 20: Malaysia Electrical and Electronics Retail Sales and Forecast (MYR mn), by Category 2008–2018	61
Figure 21: Malaysia Electrical and Electronics Retail Market Dynamics, by Category 2008–2018.....	62
Figure 22: Malaysia Communications Equipment Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	65
Figure 23: Malaysia Computer Hardware and Software Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	69
Figure 24: Malaysia Consumer Electronics Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	72
Figure 25: Malaysia Household Appliances Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	75
Figure 26: Malaysia Photographic Equipment Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018 ...	78
Figure 27: Malaysia Food and Grocery Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	81
Figure 28: Malaysia Food and Grocery Retail Market Dynamics, by Channel Group, 2008–2018	82
Figure 29: Malaysia Food and Grocery Retail Sales and Forecast (MYR mn), by Category 2008–2018	85
Figure 30: Malaysia Food and Grocery Retail Market Dynamics, by Category 2008–2018	86
Figure 31: Malaysia Drinks Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	89
Figure 32: Malaysia Household Products Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	92
Figure 33: Malaysia Packaged Food Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	95
Figure 34: Malaysia Personal Care Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	98
Figure 35: Malaysia Tobacco Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	101
Figure 36: Malaysia Unpackaged Food Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	104
Figure 37: Malaysia Furniture and Floor Coverings Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	107
Figure 38: Malaysia Furniture and Floor Coverings Retail Market Dynamics, by Channel Group, 2008–2018	108
Figure 39: Malaysia Furniture and Floor Coverings Retail Sales and Forecast (MYR mn), by Category Group, 2008–2018	111
Figure 40: Malaysia Furniture and Floor Coverings Retail Market Dynamics, by Category 2008–2018	112
Figure 41: Malaysia Floor Coverings Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	115
Figure 42: Malaysia Furniture Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	118
Figure 43: Malaysia Home and Garden Products Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	121
Figure 44: Malaysia Home and Garden Products Retail Market Dynamics, by Channel Group, 2008–2018	122
Figure 45: Malaysia Home and Garden Products Retail Sales and Forecast, by Channel Group, 2008–2018	125
Figure 46: Malaysia Home and Garden Products Retail Market Dynamics, by Category 2008–2018	126
Figure 47: Malaysia Gardening and Outdoor Living Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	129
Figure 48: Malaysia Home Improvement Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	132

Figure 49: Malaysia Homewares Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	135
Figure 50: Malaysia Music, Video and Entertainment Software Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	138
Figure 51: Malaysia Music, Video and Entertainment Software Retail Market Dynamics, by Channel Group, 2008–2018	139
Figure 52: Malaysia Music, Video and Entertainment Software Retail Sales and Forecast (MYR mn), by Category 2008–2018	142
Figure 53: Malaysia Music, Video and Entertainment Software Retail Market Dynamics, by Category 2008–2018	143
Figure 54: Malaysia Games Software Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	146
Figure 55: Malaysia Music and Video Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	149
Figure 56: Malaysia Sports and Leisure Equipment Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018	152
Figure 57: Malaysia Sports and Leisure Equipment Retail Market Dynamics, by Channel Group, 2008–2018	153
Figure 58: Malaysia Sports and Leisure Equipment Retail Sales and Forecast (MYR mn), by Category 2008–2018 ...	156
Figure 59: Malaysia Sports and Leisure Equipment Retail Market Dynamics, by Category 2008–2018	157
Figure 60: Malaysia Sports Equipment Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	160
Figure 61: Malaysia Toys and Games Retail Sales and Forecast (MYR mn), by Channel Group, 2008–2018.....	163
Figure 62: Malaysia Value Retailers Sales and Forecast (MYR mn), by Channel, 2008–2018.....	166
Figure 63: Malaysia Value Retailers Market Dynamics, by Channel, 2008–2018.....	167
Figure 64: Malaysia Value Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	170
Figure 65: Malaysia Value Retailers Market Dynamics, by Category Group, 2008–2018	171
Figure 66: Malaysia Cash and Carries and Warehouse Clubs Sales and Forecast (MYR mn), by Category Group, 2008–2018	176
Figure 67: Malaysia Value, Variety Stores and General Merchandise Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	182
Figure 68: Malaysia General Retailers Sales and Forecast (MYR mn), by Channel, 2008–2018.....	188
Figure 69: Malaysia General Retailers Market Dynamics, by Channel, 2008–2018	189
Figure 70: Malaysia General Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	192
Figure 71: Malaysia General Retailers Market Dynamics, by Category Group, 2008–2018.....	193
Figure 72: Malaysia Convenience Stores (including Independents) and Gas Stations Sales and Forecast (MYR mn), by Category Group, 2008–2018	198
Figure 73: Malaysia Department Stores Sales and Forecast (MYR mn), by Category Group, 2008–2018	203
Figure 74: Malaysia Hypermarkets, Supermarkets and Hard-Discounters Sales and Forecast (MYR mn), by Category Group, 2008–2018.....	208
Figure 75: Malaysia Vending Machines Sales and Forecast (MYR mn), by Category Group, 2008–2018.....	213
Figure 76: Malaysia Other General and Non-Specialist Direct Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018.....	219
Figure 77: Malaysia Specialist Retailers Sales and Forecast (MYR mn), by Channel 2008–2018	225
Figure 78: Malaysia Specialist Retailers Market Dynamics, by Channel 2008–2018	226
Figure 79: Malaysia Specialist Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018.....	232
Figure 80: Malaysia Specialist Retailers Market Dynamics, by Category Group, 2008–2018	233
Figure 81: Malaysia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales and Forecast (MYR mn), by Category Group, 2008–2018	239
Figure 82: Malaysia Drug Stores and Health and Beauty Stores Sales and Forecast (MYR mn), by Category Group, 2008–2018	245
Figure 83: Malaysia Duty Free Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	251
Figure 84: Malaysia Electrical and Electronics Specialists Sales and Forecast (MYR mn), by Category Group, 2008–2018	257
Figure 85: Malaysia Food and Drinks Specialists Sales and Forecast (MYR mn), by Category Group, 2008–2018	263
Figure 86: Malaysia Home Furniture and Homewares Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	269
Figure 87: Malaysia Home Improvement and Gardening Supplies Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	275
Figure 88: Malaysia Music, Video, Book, Stationery and Entertainment Software Specialists Sales and Forecast (MYR mn), by Category Group, 2008–2018	281
Figure 89: Malaysia Other Specialist Retailers Sales and Forecast (MYR mn), by Category Group, 2008–2018	287
Figure 90: Malaysia Online Retailing Sales and Forecast (MYR mn), by Category Group, 2008–2018	293
Figure 91: Malaysia Online Retailing Market Dynamics, by Category Group, 2008–2018	294
Figure 92: The Triangulated Market Sizing Methodology	306

List of Tables

Table 1: Malaysia Overall Retail Sales (MYR bn), by Category Group, 2008–2013	18
Table 2: Malaysia Overall Retail Sales Forecast (MYR bn), by Category Group, 2013–2018	19
Table 3: Malaysia Overall Retail Sales (USD bn), by Category Group, 2008–2013	20
Table 4: Malaysia Overall Retail Sales Forecast (USD bn), by Category Group, 2013–2018	21
Table 5: Malaysia Overall Retail Segmentation (% value), by Category Group, 2008–2018	21
Table 6: Malaysia Overall Retail Sales (MYR bn), by Channel Group, 2008–2013	23
Table 7: Malaysia Overall Retail Sales Forecast (MYR bn), by Channel Group, 2013–2018	24
Table 8: Malaysia Overall Retail Sales (USD bn), by Channel Group, 2008–2013	24
Table 9: Malaysia Overall Retail Sales Forecast (USD bn), by Channel Group, 2013–2018	25
Table 10: Malaysia Overall Retail Segmentation (% value), by Channel Group, 2008–2018	25
Table 11: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales (MYR mn), by Channel Group, 2008–2013	27
Table 12: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	28
Table 13: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales (USD mn), by Channel Group, 2008–2013	28
Table 14: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	29
Table 15: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Segmentation (% value), by Channel Group, 2008–2018	29
Table 16: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales (MYR mn), by Category 2008–2013	31
Table 17: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (MYR mn), by Category 2013–2018	32
Table 18: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales (USD mn), by Category 2008–2013	32
Table 19: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (USD mn), by Category, 2013–2018	33
Table 20: Malaysia Apparel, Accessories, Luggage and Leather Goods Retail Segmentation (% value), by Category, 2008–2018	33
Table 21: Malaysia Clothing and Footwear Retail Sales (MYR mn), by Channel Group, 2008–2013	35
Table 22: Malaysia Clothing and Footwear Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	35
Table 23: Malaysia Clothing and Footwear Retail Sales (USD mn), by Channel Group, 2008–2013	36
Table 24: Malaysia Clothing and Footwear Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	36
Table 25: Malaysia Clothing and Footwear Retail Segmentation, by Channel Group, 2008–2018	36
Table 26: Malaysia Jewelry, Watches and Accessories Retail Sales (MYR mn), by Channel Group, 2008–2013	37
Table 27: Malaysia Jewelry, Watches and Accessories Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	38
Table 28: Malaysia Jewelry, Watches and Accessories Retail Sales (USD mn), by Channel Group, 2008–2013	38
Table 29: Malaysia Jewelry, Watches and Accessories Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	39
Table 30: Malaysia Jewelry, Watches and Accessories Retail Segmentation, by Channel Group, 2008–2018	39
Table 31: Malaysia Luggage and Leather Goods Retail Sales (MYR mn), by Channel Group, 2008–2013	40
Table 32: Malaysia Luggage and Leather Goods Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	41
Table 33: Malaysia Luggage and Leather Goods Retail Sales (USD mn), by Channel Group, 2008–2013	41
Table 34: Malaysia Luggage and Leather Goods Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	42
Table 35: Malaysia Luggage and Leather Goods Retail Segmentation, by Channel Group, 2008–2018	42
Table 36: Malaysia Books, News and Stationery Retail Sales (MYR mn), by Channel Group, 2008–2013	44
Table 37: Malaysia Books, News and Stationery Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	45
Table 38: Malaysia Books, News and Stationery Retail Sales (USD mn), by Channel Group, 2008–2013	45
Table 39: Malaysia Books, News and Stationery Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	46
Table 40: Malaysia Books, News and Stationery Retail Segmentation (% value), by Channel Group, 2008–2018	46
Table 41: Malaysia Books, News and Stationery Retail Sales (MYR mn), by Category 2008–2013	49
Table 42: Malaysia Books, News and Stationery Retail Sales Forecast (MYR mn), by Category 2013–2018	49
Table 43: Malaysia Books, News and Stationery Retail Sales (USD mn), by Category 2008–2013	49
Table 44: Malaysia Books, News and Stationery Retail Sales Forecast (USD mn), by Category 2013–2018	50

Table 45: Malaysia Books, News and Stationery Retail Segmentation (% value), by Category, 2008–2018	50
Table 46: Malaysia Printed Media Retail Sales (MYR mn), by Channel Group, 2008–2013	52
Table 47: Malaysia Printed Media Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	52
Table 48: Malaysia Printed Media Retail Sales (USD mn), by Channel Group, 2008–2013	53
Table 49: Malaysia Printed Media Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	53
Table 50: Malaysia Printed Media Retail Segmentation, by Channel Group, 2008–2018	53
Table 51: Malaysia Stationery and Cards Retail Sales (MYR mn), by Channel Group, 2008–2013	54
Table 52: Malaysia Stationery and Cards Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	55
Table 53: Malaysia Stationery and Cards Retail Sales Forecast (USD mn), by Channel Group, 2008–2013	55
Table 54: Malaysia Stationery and Cards Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	56
Table 55: Malaysia Stationery and Cards Retail Segmentation, by Channel Group, 2008–2018	56
Table 56: Malaysia Electrical and Electronics Retail Sales (MYR mn), by Channel Group, 2008–2013	58
Table 57: Malaysia Electrical and Electronics Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	59
Table 58: Malaysia Electrical and Electronics Retail Sales (USD mn), by Channel Group, 2008–2013	59
Table 59: Malaysia Electrical and Electronics Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	60
Table 60: Malaysia Electrical and Electronics Retail Segmentation (% value), by Channel Group, 2008–2018	60
Table 61: Malaysia Electrical and Electronics Retail Sales (MYR mn), by Category 2008–2013	62
Table 62: Malaysia Electrical and Electronics Retail Sales Forecast (MYR mn), by Category 2013–2018	63
Table 63: Malaysia Electrical and Electronics Retail Sales (USD mn), by Category 2008–2013	63
Table 64: Malaysia Electrical and Electronics Retail Sales Forecast (USD mn), by Category 2013–2018	64
Table 65: Malaysia Electrical and Electronics Retail Segmentation (% value), by Category, 2008–2018	64
Table 66: Malaysia Communications Equipment Retail Sales (MYR mn), by Channel Group 2008–2013	66
Table 67: Malaysia Communications Equipment Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	67
Table 68: Malaysia Communications Equipment Retail Sales (USD mn), by Channel Group 2008–2013	67
Table 69: Malaysia Communications Equipment Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	68
Table 70: Malaysia Communications Equipment Retail Segmentation, by Channel Group, 2008–2018	68
Table 71: Malaysia Computer Hardware and Software Retail Sales (MYR mn), by Channel Group, 2008–2013	69
Table 72: Malaysia Computer Hardware and Software Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	70
Table 73: Malaysia Computer Hardware and Software Retail Sales (USD mn), by Channel Group, 2008–2013	70
Table 74: Malaysia Computer Hardware and Software Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	71
Table 75: Malaysia Computer Hardware and Software Retail Segmentation, by Channel Group, 2008–2018	71
Table 76: Malaysia Consumer Electronics Retail Sales (MYR mn), by Channel Group, 2008–2013	72
Table 77: Malaysia Consumer Electronics Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	73
Table 78: Malaysia Consumer Electronics Retail Sales (USD mn), by Channel Group, 2008–2013	73
Table 79: Malaysia Consumer Electronics Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	74
Table 80: Malaysia Consumer Electronics Retail Segmentation, by Channel Group, 2008–2018	74
Table 81: Malaysia Household Appliances Retail Sales (MYR mn), by Channel Group, 2008–2013	75
Table 82: Malaysia Household Appliances Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	76
Table 83: Malaysia Household Appliances Retail Sales (USD mn), by Channel Group, 2008–2013	76
Table 84: Malaysia Household Appliances Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	77
Table 85: Malaysia Household Appliances Retail Segmentation, by Channel Group, 2008–2018	77
Table 86: Malaysia Photographic Equipment Retail Sales (MYR mn), by Channel Group, 2008–2013	78
Table 87: Malaysia Photographic Equipment Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	79
Table 88: Malaysia Photographic Equipment Retail Sales (USD mn), by Channel Group, 2008–2013	79
Table 89: Malaysia Photographic Equipment Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	80
Table 90: Malaysia Photographic Equipment Retail Segmentation, by Channel Group, 2008–2018	80
Table 91: Malaysia Food and Grocery Retail Sales (MYR mn), by Channel Group, 2008–2013	82
Table 92: Malaysia Food and Grocery Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	83
Table 93: Malaysia Food and Grocery Retail Sales (USD mn), by Channel Group, 2008–2013	83
Table 94: Malaysia Food and Grocery Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	84
Table 95: Malaysia Food and Grocery Retail Segmentation (% value), by Channel Group, 2008–2018	84
Table 96: Malaysia Food and Grocery Retail Sales (MYR mn), by Category 2008–2013	86
Table 97: Malaysia Food and Grocery Retail Sales Forecast (MYR mn), by Category 2013–2018	87
Table 98: Malaysia Food and Grocery Retail Sales (USD mn), by Category, 2008–2013	87
Table 99: Malaysia Food and Grocery Retail Sales Forecast (MYR mn), by Category 2013–2018	88
Table 100: Malaysia Food and Grocery Retail Segmentation (% value), by Category, 2008–2018	88

Table 101: Malaysia Drinks Retail Sales (MYR mn), by Channel Group, 2008–2013	89
Table 102: Malaysia Drinks Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018.....	90
Table 103: Malaysia Drinks Retail Sales (USD mn), by Channel Group, 2008–2013.....	90
Table 104: Malaysia Drinks Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	91
Table 105: Malaysia Drinks Retail Segmentation, by Channel Group, 2008–2018.....	91
Table 106: Malaysia Household Products Retail Sales (MYR mn), by Channel Group, 2008–2013	92
Table 107: Malaysia Household Products Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	93
Table 108: Malaysia Household Products Retail Sales (USD mn), by Channel Group, 2008–2013.....	93
Table 109: Malaysia Household Products Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	94
Table 110: Malaysia Household Products Retail Segmentation, by Channel Group, 2008–2018.....	94
Table 111: Malaysia Packaged Food Retail Sales (MYR mn), by Channel Group, 2008–2013.....	95
Table 112: Malaysia Packaged Food Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	96
Table 113: Malaysia Packaged Food Retail Sales (USD mn), by Channel Group, 2008–2013	96
Table 114: Malaysia Packaged Food Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	97
Table 115: Malaysia Packaged Food Retail Segmentation, by Channel Group, 2008–2018	97
Table 116: Malaysia Personal Care Retail Sales (MYR mn), by Channel Group, 2008–2013	98
Table 117: Malaysia Personal Care Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018.....	99
Table 118: Malaysia Personal Care Retail Sales (USD mn), by Channel Group, 2008–2013	99
Table 119: Malaysia Personal Care Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	100
Table 120: Malaysia Personal Care Retail Segmentation, by Channel Group, 2008–2018	100
Table 121: Malaysia Tobacco Retail Sales (MYR mn), by Channel Group, 2008–2013	101
Table 122: Malaysia Tobacco Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	102
Table 123: Malaysia Tobacco Retail Sales (USD mn), by Channel Group, 2008–2013	102
Table 124: Malaysia Tobacco Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	103
Table 125: Malaysia Tobacco Retail Segmentation, by Channel Group, 2008–2018.....	103
Table 126: Malaysia Unpackaged Food Retail Sales (MYR mn), by Channel Group, 2008–2013	104
Table 127: Malaysia Unpackaged Food Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	105
Table 128: Malaysia Unpackaged Food Retail Sales (USD mn), by Channel Group, 2008–2013	105
Table 129: Malaysia Unpackaged Food Retail Sales Forecast (USD mn), by Channel, 2013–2018	106
Table 130: Malaysia Unpackaged Food Retail Segmentation, by Channel Group, 2008–2018.....	106
Table 131: Malaysia Furniture and Floor Coverings Retail Sales (MYR mn), by Channel Group, 2008–2013.....	108
Table 132: Malaysia Furniture and Floor Coverings Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	109
Table 133: Malaysia Furniture and Floor Coverings Retail Sales (USD mn), by Channel Group, 2008–2013	109
Table 134: Malaysia Furniture and Floor Coverings Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	110
Table 135: Malaysia Furniture and Floor Coverings Segmentation (% value), by Channel Group, 2008–2018.....	110
Table 136: Malaysia Furniture and Floor Coverings Retail Sales (MYR mn), by Category, 2008–2013.....	112
Table 137: Malaysia Furniture and Floor Coverings Retail Sales Forecast (MYR mn), by Category 2013–2018	113
Table 138: Malaysia Furniture and Floor Coverings Retail Sales (USD mn), by Category, 2008–2013	113
Table 139: Malaysia Furniture and Floor Coverings Retail Sales Forecast (USD mn), by Category 2013–2018	114
Table 140: Malaysia Furniture and Floor Coverings Retail Segmentation (% value), by Category, 2008–2018	114
Table 141: Malaysia Floor Coverings Retail Sales (MYR mn), by Channel Group, 2008–2013.....	116
Table 142: Malaysia Floor Coverings Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	116
Table 143: Malaysia Floor Coverings Retail Sales (USD mn), by Channel Group, 2008–2013	117
Table 144: Malaysia Floor Coverings Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	117
Table 145: Malaysia Floor Coverings Retail Segmentation, by Channel Group, 2008–2018	117
Table 146: Malaysia Furniture Retail Sales (MYR mn), by Channel Group, 2008–2013	118
Table 147: Malaysia Furniture Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	119
Table 148: Malaysia Furniture Retail Sales (USD mn), by Channel Group, 2008–2013	119
Table 149: Malaysia Furniture Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	120
Table 150: Malaysia Furniture Retail Segmentation, by Channel Group, 2008–2018	120
Table 151: Malaysia Home and Garden Products Retail Sales (MYR mn), by Channel Group, 2008–2013	122
Table 152: Malaysia Home and Garden Products Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018 ..	123
Table 153: Malaysia Home and Garden Products Retail Sales (USD mn), by Channel Group, 2008–2013	123
Table 154: Malaysia Home and Garden Products Retail Sales Forecast (USD mn), by Channel Group, 2013–2018 ..	124
Table 155: Malaysia Home and Garden Products Retail Segmentation (% value), by Channel Group, 2008–2018 ..	124
Table 156: Malaysia Home and Garden Products Retail Sales (MYR mn), by Category, 2008–2013	126

Table 157: Malaysia Home and Garden Products Retail Sales Forecast (MYR mn), by Category 2013–2018	127
Table 158: Malaysia Home and Garden Products Retail Sales (USD mn), by Category, 2008–2013	127
Table 159: Malaysia Home and Garden Products Retail Sales Forecast (USD mn), by Channel Group, 2013–2018... 128	128
Table 160: Malaysia Home and Garden Products Retail Segmentation (% value), by Category, 2008–2018	128
Table 161: Malaysia Gardening and Outdoor Living Retail Sales (MYR mn), by Channel Group, 2008–2013	129
Table 162: Malaysia Gardening and Outdoor Living Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018130	130
Table 163: Malaysia Gardening and Outdoor Living Retail Sales (USD mn), by Channel Group, 2008–2013	130
Table 164: Malaysia Gardening and Outdoor Living Retail Sales Forecast (USD mn), by Channel Group, 2013–2018131	131
Table 165: Malaysia Gardening and Outdoor Living Retail Segmentation, by Channel Group, 2008–2018	131
Table 166: Malaysia Home Improvement Retail Sales (MYR mn), by Channel Group, 2008–2013	132
Table 167: Malaysia Home Improvement Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018.....133	133
Table 168: Malaysia Home Improvement Retail Sales (USD mn), by Channel Group, 2008–2013.....133	133
Table 169: Malaysia Home Improvement Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	134
Table 170: Malaysia Home Improvement Retail Segmentation, by Channel Group, 2008–2018	134
Table 171: Malaysia Homewares Retail Sales (MYR mn), by Channel Group, 2008–2013.....135	135
Table 172: Malaysia Homewares Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	136
Table 173: Malaysia Homewares Retail Sales (USD mn), by Channel Group, 2008–2013	136
Table 174: Malaysia Homewares Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	137
Table 175: Malaysia Homewares Retail Segmentation, by Channel Group, 2008–2018	137
Table 176: Malaysia Music, Video and Entertainment Software Retail Sales (MYR mn), by Channel Group, 2008–2013139	139
Table 177: Malaysia Music, Video and Entertainment Software Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	140
Table 178: Malaysia Music, Video and Entertainment Software Retail Sales (USD mn), by Channel Group, 2008–2013140	140
Table 179: Malaysia Music, Video and Entertainment Software Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	141
Table 180: Malaysia Music, Video and Entertainment Software Retail Segmentation (% value), by Channel Group, 2008–2018	141
Table 181: Malaysia Music, Video and Entertainment Software Retail Sales (MYR mn), by Category, 2008–2013.....143	143
Table 182: Malaysia Music, Video and Entertainment Software Retail Sales Forecast (MYR mn), by Category 2013–2018 144	144
Table 183: Malaysia Music, Video and Entertainment Software Retail Sales (USD mn), by Category, 2008–2013.....144	144
Table 184: Malaysia Music, Video and Entertainment Software Retail Sales Forecast (USD mn), by Category 2013–2018 145	145
Table 185: Malaysia Music, Video and Entertainment Software Retail Segmentation (% value), by Category 2008–2018145	145
Table 186: Malaysia Games Software Retail Sales (MYR mn), by Channel Group, 2008–2013	146
Table 187: Malaysia Games Software Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018.....147	147
Table 188: Malaysia Games Software Retail Sales (USD mn), by Channel Group, 2008–2013.....147	147
Table 189: Malaysia Games Software Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	148
Table 190: Malaysia Games Software Retail Segmentation, by Channel Group, 2008–2018	148
Table 191: Malaysia Music and Video Retail Sales (MYR mn), by Channel Group, 2008–2013	149
Table 192: Malaysia Music and Video Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	150
Table 193: Malaysia Music and Video Retail Sales (USD mn), by Channel Group, 2008–2013.....150	150
Table 194: Malaysia Music and Video Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	151
Table 195: Malaysia Music and Video Retail Segmentation, by Channel Group, 2008–2018.....151	151
Table 196: Malaysia Sports and Leisure Equipment Retail Sales (MYR mn), by Channel Group, 2008–2013	153
Table 197: Malaysia Sports and Leisure Equipment Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018154	154
Table 198: Malaysia Sports and Leisure Equipment Retail Sales (USD mn), by Channel Group, 2008–2013	154
Table 199: Malaysia Sports and Leisure Equipment Retail Sales Forecast (USD mn), by Channel Group, 2013–2018155	155
Table 200: Malaysia Sports and Leisure Equipment Retail Segmentation (% value), by Channel Group, 2008–2018.. 155	155
Table 201: Malaysia Sports and Leisure Equipment Retail Sales (MYR mn), by Category, 2008–2013	157
Table 202: Malaysia Sports and Leisure Equipment Retail Sales Forecast (MYR mn), by Category 2013–2018.....158	158
Table 203: Malaysia Sports and Leisure Equipment Retail Sales (USD mn), by Category, 2008–2013	158
Table 204: Malaysia Sports and Leisure Equipment Retail Sales Forecast (USD mn), by Category 2013–2018.....159	159
Table 205: Malaysia Sports and Leisure Equipment Retail Segmentation (% value), by Category 2008–2018.....159	159
Table 206: Malaysia Sports Equipment Retail Sales (MYR mn), by Channel Group, 2008–2013	160
Table 207: Malaysia Sports Equipment Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018.....161	161
Table 208: Malaysia Sports Equipment Retail Sales (USD mn), by Channel Group, 2008–2013.....161	161
Table 209: Malaysia Sports Equipment Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	162

Table 210: Malaysia Sports Equipment Retail Segmentation, by Channel Group, 2008–2018.....	162
Table 211: Malaysia Toys and Games Retail Sales (MYR mn), by Channel Group, 2008–2013	163
Table 212: Malaysia Toys and Games Retail Sales Forecast (MYR mn), by Channel Group, 2013–2018	164
Table 213: Malaysia Toys and Games Retail Sales (USD mn), by Channel Group, 2008–2013	164
Table 214: Malaysia Toys and Games Retail Sales Forecast (USD mn), by Channel Group, 2013–2018	165
Table 215: Malaysia Toys and Games Retail Segmentation, by Channel Group, 2008–2018.....	165
Table 216: Malaysia Value Retailers Sales (MYR mn), by Channel, 2008–2013	167
Table 217: Malaysia Value Retailers Sales Forecast (MYR mn), by Channel, 2013–2018	168
Table 218: Malaysia Value Retailers Sales (USD mn), by Channel, 2008–2013.....	168
Table 219: Malaysia Value Retailers Sales Forecast (USD mn), by Channel, 2013–2018	169
Table 220: Malaysia Value Retailers Segmentation (% value), by Channel, 2008–2018	169
Table 221: Malaysia Value Retailers Sales (MYR mn), by Category Group, 2008–2013	172
Table 222: Malaysia Value Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018	173
Table 223: Malaysia Value Retailers Sales (USD mn), by Category Group, 2008–2013	174
Table 224: Malaysia Value Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	175
Table 225: Malaysia Value Retailers Segmentation (% value), by Category Group, 2008–2018	175
Table 226: Malaysia Cash and Carries and Warehouse Clubs Sales (MYR mn), by Category Group, 2008–2013	177
Table 227: Malaysia Cash and Carries and Warehouse Clubs Sales Forecast (MYR mn), by Category Group, 2013–2018	178
Table 228: Malaysia Cash and Carries and Warehouse Clubs Sales (USD mn), by Category Group, 2008–2013	179
Table 229: Malaysia Cash and Carries and Warehouse Clubs Sales (USD mn), by Category Group, 2013–2018	180
Table 230: Malaysia Cash and Carries and Warehouse Clubs Segmentation (% value), by Category Group, 2008–2018.....	181
Table 231: Malaysia Value, Variety Stores and General Merchandise Retailers Sales (MYR mn), by Category Group, 2008–2013	183
Table 232: Malaysia Value, Variety Stores and General Merchandise Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018	184
Table 233: Malaysia Value, Variety Stores and General Merchandise Retailers Sales (USD mn), by Category Group, 2008–2013	185
Table 234: Malaysia Value, Variety Stores and General Merchandise Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	186
Table 235: Malaysia Value, Variety Stores and General Merchandise Retailers Segmentation (% value), by Category Group, 2013–2018.....	187
Table 236: Malaysia General Retailers Sales (MYR mn), by Channel, 2008–2013.....	189
Table 237: Malaysia General Retailers Sales Forecast (MYR mn), by Channel, 2013–2018	190
Table 238: Malaysia General Retailers Sales (USD mn), by Channel, 2008–2013	190
Table 239: Malaysia General Retailers Sales Forecast (USD mn), by Channel, 2013–2018	191
Table 240: Malaysia General Retailers Segmentation (% value), by Channel 2008–2018	191
Table 241: Malaysia General Retailers Sales (MYR mn), by Category Group, 2008–2013	194
Table 242: Malaysia General Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018	195
Table 243: Malaysia General Retailers Sales (USD mn), by Category Group, 2008–2013.....	196
Table 244: Malaysia General Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	197
Table 245: Malaysia General Retailers Segmentation (% value), by Category Group, 2008–2018	197
Table 246: Malaysia Convenience Stores (including Independents) and Gas Stations Sales (MYR mn), by Category Group, 2008–2013.....	199
Table 247: Malaysia Convenience Stores (including Independents) and Gas Stations Sales Forecast (MYR mn), by Category Group, 2013–2018	200
Table 248: Malaysia Convenience Stores (including Independents) and Gas Stations Sales (USD mn), by Category Group, 2008–2013.....	201
Table 249: Malaysia Convenience Stores (including Independents) and Gas Stations Sales Forecast (USD mn), by Category Group, 2013–2018	202
Table 250: Malaysia Convenience Stores (including Independents) and Gas Stations Segmentation (% value), by Category Group, 2008–2018	202
Table 251: Malaysia Department Stores Sales (MYR mn), by Category Group, 2008–2013	204
Table 252: Malaysia Department Stores Sales Forecast (MYR mn), by Category Group, 2013–2018	205
Table 253: Malaysia Department Stores Sales (USD mn), by Category Group, 2008–2013	206
Table 254: Malaysia Department Stores Sales Forecast (USD mn), by Category Group, 2013–2018	207
Table 255: Malaysia Department Stores Segmentation (% value), by Category Group, 2008–2018.....	207

Table 256: Malaysia Hypermarkets, Supermarkets and Hard-Discounters Sales (MYR mn), by Category Group, 2008–2013	209
Table 257: Malaysia Hypermarkets, Supermarkets and Hard-Discounters Sales Forecast (MYR mn), by Category Group, 2013–2018	210
Table 258: Malaysia Hypermarkets, Supermarkets and Hard-Discounters Sales (USD mn), by Category Group, 2008–2013	211
Table 259: Malaysia Hypermarkets, Supermarkets and Hard-Discounters Sales Forecast (USD mn), by Category Group, 2013–2018	212
Table 260: Malaysia Hypermarkets, Supermarkets and Hard-Discounters Segmentation (% value), by Category Group, 2008–2018	212
Table 261: Malaysia Vending Machines Sales (MYR mn), by Category Group, 2008–2013	214
Table 262: Malaysia Vending Machines Sales Forecast (MYR mn), by Category Group, 2013–2018	215
Table 263: Malaysia Vending Machines Sales (USD mn), by Category Group, 2008–2013	216
Table 264: Malaysia Vending Machines Sales Forecast (USD mn), by Category Group, 2013–2018	217
Table 265: Malaysia Vending Machines Segmentation (% value), by Category Group, 2008–2018	218
Table 266: Malaysia Other General and Non-Specialist Retailers Sales (MYR mn), by Category Group, 2008–2013..	220
Table 267: Malaysia Other General and Non-Specialist Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018	221
Table 268: Malaysia Other General and Non-Specialist Retailers Sales (USD mn), by Category Group, 2008–2013 ..	222
Table 269: Malaysia Other General and Non-Specialist Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	223
Table 270: Malaysia Other General and Non-Specialist Retailers Segmentation (% value), by Category Group, 2008–2018	224
Table 271: Malaysia Specialist Retailers Sales (MYR mn), by Channel 2008–2013	227
Table 272: Malaysia Specialist Retailers Sales Forecast (MYR mn), by Channel 2013–2018	228
Table 273: Malaysia Specialist Retailers Sales (USD mn), by Channel, 2008–2013	229
Table 274: Malaysia Specialist Retailers Sales Forecast (USD mn), by Channel 2013–2018	230
Table 275: Malaysia Specialist Retailers Segmentation (% value), by Channel, 2008–2018.....	231
Table 276: Malaysia Specialist Retailers Sales (MYR mn), by Category Group, 2008–2013	234
Table 277: Malaysia Specialist Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018	235
Table 278: Malaysia Specialist Retailers Sales (USD mn), by Category Group, 2008–2013	236
Table 279: Malaysia Specialist Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	237
Table 280: Malaysia Specialist Retailers Segmentation (% value), by Category Group, 2008–2018	238
Table 281: Malaysia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales (MYR mn), by Category Group,2008–2013	240
Table 282: Malaysia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales Forecast (MYR mn), by Category Group, 2013–2018	241
Table 283: Malaysia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales (USD mn), by Category Group, 2008–2013.....	242
Table 284: Malaysia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales Forecast (USD mn), by Category Group, 2013–2018	243
Table 285: Malaysia Clothing, Footwear, Accessories and Luxury Goods Specialists Segmentation (% value), by Category Group, 2008–2018	244
Table 286: Malaysia Drug Stores and Health and Beauty Stores Sales (MYR mn), by Category Group, 2008–2013... 246	
Table 287: Malaysia Drug Stores and Health and Beauty Stores Sales Forecast (MYR mn), by Category Group, 2013–2018	247
Table 288: Malaysia Drug Stores and Health and Beauty Stores Sales (USD mn), by Category Group, 2008–2013 ... 248	
Table 289: Malaysia Drug Stores and Health and Beauty Stores Sales Forecast (USD mn), by Category Group, 2013–2018	249
Table 290: Malaysia Drug Stores and Health and Beauty Stores Segmentation (% value), by Category Group, 2008–2018	250
Table 291: Malaysia Duty Free Retailers Sales (MYR mn), by Category Group, 2008–2013	252
Table 292: Malaysia Duty Free Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018.....	253
Table 293: Malaysia Duty Free Retailers Sales (USD mn), by Category Group, 2008–2013	254
Table 294: Malaysia Duty Free Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	255
Table 295: Malaysia Duty Free Retailers Segmentation (% value), by Category Group, 2008–2018	256
Table 296: Malaysia Electrical and Electronics Specialists Sales (MYR mn), by Category Group, 2008–2013..... 258	
Table 297: Malaysia Electrical and Electronics Specialists Sales Forecast (MYR mn), by Category Group, 2013–2018	259

Table 298: Malaysia Electrical and Electronics Specialists Sales (USD mn), by Category Group, 2008–2013	260
Table 299: Malaysia Electrical and Electronics Specialists Sales Forecast (USD mn), by Category Group, 2013–2018	261
Table 300: Malaysia Electrical and Electronics Specialists Segmentation (% value), by Category Group, 2008–2018.	262
Table 301: Malaysia Food and Drinks Specialists Sales (MYR mn), by Category Group, 2008–2013	264
Table 302: Malaysia Food and Drinks Specialists Sales Forecast (MYR mn), by Category Group, 2013–2018	265
Table 303: Malaysia Food and Drinks Specialists Sales (USD mn), by Category Group, 2008–2013	266
Table 304: Malaysia Food and Drinks Specialists Sales Forecast (USD mn), by Category Group, 2013–2018	267
Table 305: Malaysia Food and Drinks Specialists Segmentation (% value), by Category Group, 2008–2018.....	268
Table 306: Malaysia Home Furniture and Homewares Retailers Sales (MYR mn), by Category Group, 2008–2013....	270
Table 307: Malaysia Home Furniture and Homewares Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018	271
Table 308: Malaysia Home Furniture and Homewares Retailers Sales (USD mn), by Category Group, 2008–2013....	272
Table 309: Malaysia Home Furniture and Homewares Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	273
Table 310: Malaysia Home Furniture and Homewares Retailers Segmentation (% value), by Category Group, 2008–2018 .	274
Table 311: Malaysia Home Improvement and Gardening Supplies Retailers Sales (MYR mn), by Category Group, 2008–2013	276
Table 312: Malaysia Home Improvement and Gardening Supplies Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018.....	277
Table 313: Malaysia Home Improvement and Gardening Supplies Retailers Sales (USD mn), by Category Group, 2008–2013	278
Table 314: Malaysia Home Improvement and Gardening Supplies Retailers Sales Forecast (USD mn), by Category Group, 2013–2018.....	279
Table 315: Malaysia Home Improvement and Gardening Supplies Retailers Segmentation (% value), by Category Group, 2008–2018.....	280
Table 316: Malaysia Music, Video, Book, Stationery and Entertainment Software Specialists Sales (MYR mn), by Category Group, 2008–2013	282
Table 317: Malaysia Music, Video, Book, Stationery and Entertainment Software Specialists Sales Forecast (MYR mn), by Category Group, 2013–2018	283
Table 318: Malaysia Music, Video, Book, Stationery and Entertainment Software Specialists Sales (USD mn), by Category Group, 2008–2013	284
Table 319: Malaysia Music, Video, Book, Stationery and Entertainment Software Specialists Sales Forecast (USD mn), by Category Group, 2013–2018	285
Table 320: Malaysia Music, Video, Book, Stationery and Entertainment Software Specialists Segmentation (% value), by Category Group, 2008–2018	286
Table 321: Malaysia Other Specialist Retailers Sales (MYR mn), by Category Group, 2008–2013	288
Table 322: Malaysia Other Specialist Retailers Sales Forecast (MYR mn), by Category Group, 2013–2018.....	289
Table 323: Malaysia Other Specialist Retailers Sales (USD mn), by Category Group, 2008–2013.....	290
Table 324: Malaysia Other Specialist Retailers Sales Forecast (USD mn), by Category Group, 2013–2018	291
Table 325: Malaysia Other Specialist Retailers Segmentation (% value), by Category Group, 2008–2018	292
Table 326: Malaysia Online Retailing Sales (MYR mn), by Category Group, 2008–2013.....	295
Table 327: Malaysia Online Retailing Sales Forecast (MYR mn), by Category Group, 2013–2018	296
Table 328: Malaysia Online Retailing Sales (USD mn), by Category Group, 2008–2013	297
Table 329: Malaysia Online Retailing Sales Forecast (USD mn), by Category Group, 2013–2018	298
Table 330: Malaysia Online Retailing Segmentation (% value), by Category Group, 2008–2018	299
Table 331: Malaysia Exchange Rate MYR–US\$ (Annual Average), 2008–2013.....	300
Table 332: Malaysia Exchange Rate MYR–US\$ (Annual Average), 2014–2018	300
Table 333: Conlumino Retail Channel Definitions	301
Table 334: Conlumino Retail Category Definitions	303

About Conlumino

Conlumino Global Retail offers a comprehensive 360° view of the retail landscape. A team of analysts, with more than 200 years of combined experience, help you identify and understand the most current retail trends.

Last year hundreds of retail businesses across the globe used our research to make critical business decisions.

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