

## Sandwiches and Lunchtime Foods - UK - November 2012

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“Product innovation based around added-value attributes (eg contains one of your five-a-day) and an offering differentiated from at-home foods should help operators to better compete with packed lunch options. A focus on fresh products offers one avenue of exploring such differentiation, also coming across in the consumer research of this report as being of high interest to lunchtime diners.”

– Helena Spicer – Senior Foodservice Analyst

### In this report we answer the key questions:

- What steps can sandwich operators take to address the ‘new normal’ frugal mentality?
- How can operators use provenance to help to drive sales?
- How can operators connect with consumers on levels other than price?
- Can sandwich operators tap into healthy eating trends?

Estimated to have reached £4.3 billion in 2012, sales of sandwiches are thought to have grown by around 1% in the last year, largely driven by food inflation as consumers continue to show cautious spending behaviour whilst confidence remains low. Thus, in real terms the market has continued to contract as it faces continuing pressures such as competition from other options in the retail channel, and packed lunches whilst in the out-of-home market much innovation has been focused on offering consumers alternative lunch options such as hot food as operators look to re-establish their point of difference and value-for-money stance when compared to packed lunch and retail options.

The report focuses on consumer behaviour and attitudes towards lunch as well as investigating the menu enticements which are likely to gain the most resonance with cost-conscious consumers going forward.

The different sections of the report examine the type of food commonly eaten at lunchtime by adults, with a focus on sandwiches, as they represent an important part of the market, as well as consumer attitudes towards sandwiches and potential menu enticements. This report also explores the changing consumption patterns around lunchtime foods, as well as manufacturers’ efforts to position their products as convenient and healthy lunchtime solutions.

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