

Sandwiches Unwrapped 2022



Eating Better

Executive Summary

What's happening in the sector?

Since our 2019 Sandwich Survey, our latest data for 2022 shows that the range of sandwiches has decreased across the board, shrinking by more than 50% at some food service and food retail businesses. The reason for this contraction is unclear, but may be due, in part, to the post-Covid workplace lunch market still trying to recover.

Food service has moved very quickly to increase the number of meat-free sandwich options they sell and is driving change in the sector. 34% of their sandwiches are meat-free and half of this is plant-based. Meanwhile, food retailers are lagging behind. Some of the major supermarkets have regressed, offering less meat-free options now than they did in 2019.

What's in the sandwich?

One of the stand-out statistics from our 2022 Sandwich Survey is the rise of alternative protein as a meat-free sandwich filling, up by 620% since 2019. Data released last year showed a record period of investment in alternative proteins, rising by 60% on the previous year and is expected to continue growing¹.

Of the Big Four supermarkets, Sainsbury's has doubled its plant-based offer since 2019, but Tesco has reduced its meat-free sandwich offer by 28%, whilst Morrisons and Asda have removed their plant-based sandwich options entirely.

Vegetarian sandwiches are the big casualty in trimmed down retailer ranges, with a 22% drop as a proportion of the range.

Overall, meat (38% of sandwiches contain red or processed meat and 28% contain chicken) and cheese (32%) sandwiches continue to dominate the sector. The range of options doesn't support healthy and sustainable choices. The most common filling in sandwiches with high salt or high fat levels is meat.

Price is an issue

Despite the growth in plant-based options, on average, they are still the most expensive sandwich type, making the most sustainable option less attainable and accessible and particularly so in a cost of living crisis.

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Why are we talking about sandwiches?



Britain invented the sandwich and it is a staple of our diet, particularly at lunchtime. There is a huge variety of high street retailers offering hundreds of different sandwich options for commuters and other people on the move. According to the British Sandwich Association, in the UK we spend over £8.2bn on sandwiches every year, equivalent to roughly 3.8 billion sandwiches ².

It is no secret that the Covid-19 pandemic was a major disruptor to traditional consumer behaviour and purchasing. In 2020, the UK food-to-go market declined by 45.5% ³ as travel and outdoors movement were restricted, and most of the population started to work from home. Instead, the consumer market shifted towards food delivery services - delivery and takeaway at-home lunches tripled between 2019

and October 2021 ⁴. Since restrictions have eased, there has been a resurgence in the food-to-go market ⁵, largely due to the increased footfall as many people return to the workplace.

Sandwiches can be part of a healthy and sustainable diet. For most of us, adhering to the Eatwell guide means finding ways to eat more fruit, vegetables, beans and pulses and cutting down on meat and cheese ⁶. Sandwiches with whole-grain breads and a variety of plant-based fillings, alongside fruit and veg snacks, can help us get a better balance. Our previous surveys show the sandwich offer in the high street, dominated by meat and cheese, did not support better choices. The snacks that come with sandwich meal deals are also poor: a recent survey found 70% of meal deal snacks were HFSS products, and only 5% were fruit and veg ⁷.

Retailers have an important role to play in creating the right food environment to help people make healthy and sustainable choices, including shifting to more plant-based eating with 'less and better' meat. Convenience is important, so what is available in pre-prepared food categories largely shapes our choices. Research shows that having a higher proportion of plant-based options improves take up ⁸, and people who eat meat may be significantly more likely to choose vegetarian options when at least 75% of the range on offer is vegetarian ⁹. The lack of enough varied and tasty plant-based sandwich options on the high street is an obstacle for people looking to eat better for their health and the planet.



Corporate climate pledges v what's on sale

Most of the companies we surveyed have comprehensive sustainability commitments, including targets to reduce emissions and help people eat better. But are these commitments translating into a good balance of healthy and climate-friendly options on shelves? Our survey shows that while some retailers are matching words with actions by offering more choice on plant-based options and reducing meat content, others have work to do to meet the pledges they have made.

★ PRET A MANGER ★

Pret is leading the field with a better balance of options (42% of its range is meat) but plant-based sandwiches are 9% more expensive than meat.

“There is much more for us to do throughout our supply chains and through a review of every activity in our business.”

(Pret, 2020) ¹¹

Sainsbury's

Sainsbury's is offering more plant-based sandwiches, but they are 15% more expensive than meat options, despite its pledge to offer incentives to eat better:

“A key priority for our business is to develop and deliver healthy and sustainable diets for all, therefore we aim to provide customers with the information, incentives and rewards to encourage healthier and more sustainable food choices.”

(Sainsbury's, 2021) ¹⁰

TESCO

Tesco's plant-based and vegetarian offers have shrunk by more than a quarter on 2019 figures, but there is parity on price, with plant-based sandwiches within 5% of the price of meat.

“As we strive to provide our customers with affordable, healthy, sustainable food, we are also taking action on important issues including climate change and restoring nature.”

(Tesco, 2021) ¹³

GREGGS

Greggs has made some progress making plant-based sandwiches cheaper by a fifth, compared to meat options, but the range is still 61% meat-based.

“We're making Greggs better for their health, better for their communities and better for the planet.”

Roger Whiteside, CEO Greggs (2021) ¹²



How do we measure progress?

Eating Better's goal is to halve our meat and dairy consumption in the UK by the end of this crucial decade of action and for a transition to [‘better’ meat and dairy](#) production as standard.

Retailers greatly influence how we shop and what we eat and holding them to account is key to shifting the dial to help us eat better. To measure progress towards a better food environment, with less meat and more affordable, sustainable foods, we are using the Sandwich Survey as a proxy.

In our analysis we track progress by examining what's on offer in the sandwich aisle against some of our key [Better By Half](#) roadmap asks:



Is there a good balance of options available to buy?

We look at how many sandwiches contain meat, fish and cheese as a proportion of the range, the fillings that dominate the shelves, whether they are healthy, and how retailers compare in their offer.

Are retailers improving their offer to include more meat-free foods?

We look at whether retailers have increased their vegetarian and plant-based sandwich offer since 2019.

Are retailers encouraging sales of plant foods?

We look at how they are pricing their vegetarian and plant-based sandwiches in comparison to their meat offer.



Key findings

Smaller range to choose from:

There are less sandwich options on shelves with the majority of retailers significantly trimming down their offer. Compared to our 2019 survey, the range of sandwiches available at Morrisons, Asda, Boots, Waitrose, M&S and Pret a Manger has shrank by 50% or more.

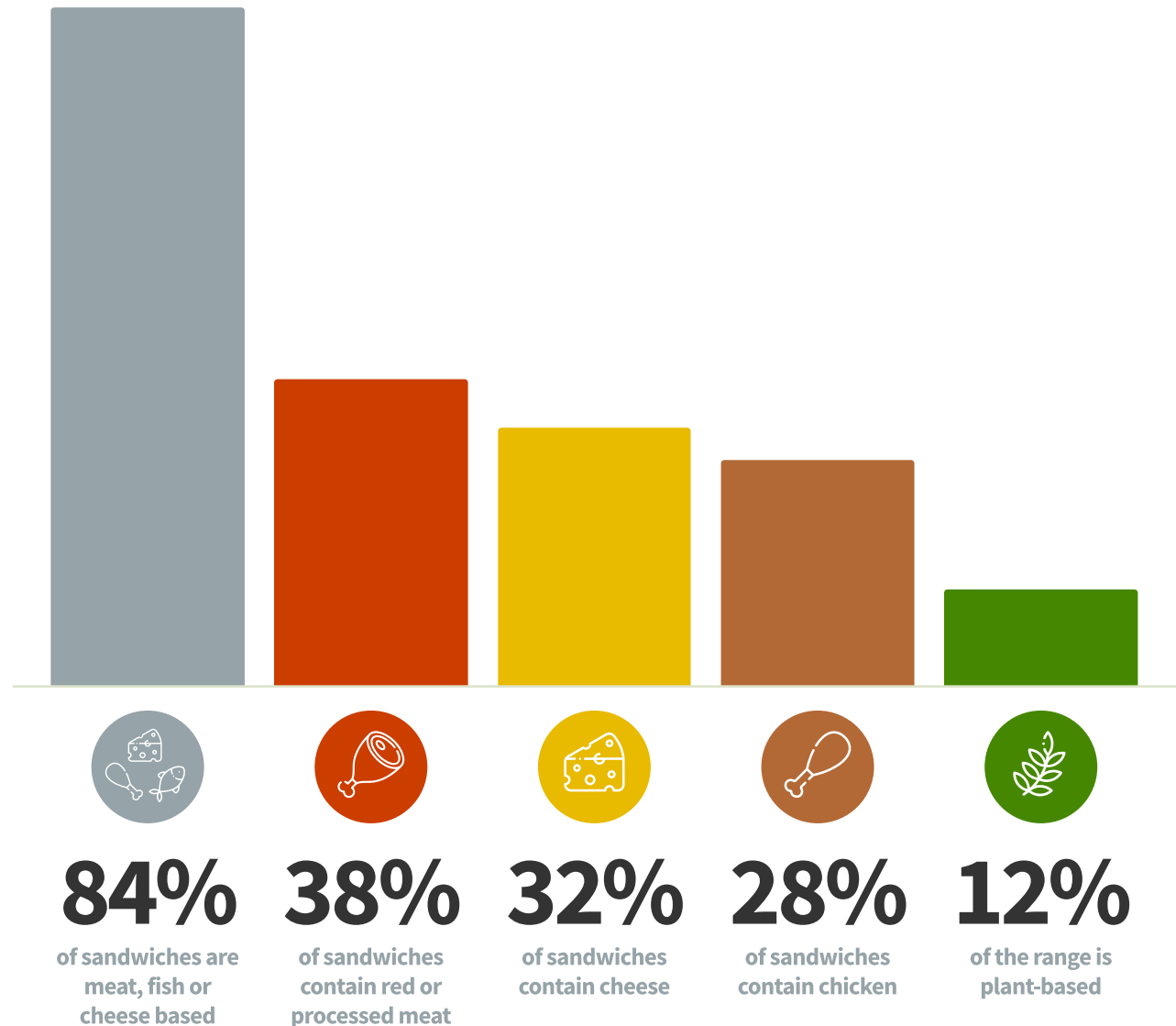
Still too much meat and dairy on shelves:

84% of sandwiches in the UK high street contain meat, fish or cheese. The sandwich aisle is dominated by meat: it is the main ingredient in 59% of sandwiches. The number of meat sandwiches has slightly increased by 2% on our 2019 survey.

Not enough meat-free options:

Despite a substantial increase in plant-based options, on 2019 data, we found less meat-free sandwiches on offer. This is driven by a 22% drop in the number of vegetarian sandwiches, as a proportion of the offer. Vegetarian sandwiches are also cheese-heavy: a hefty 44% contain cheese.

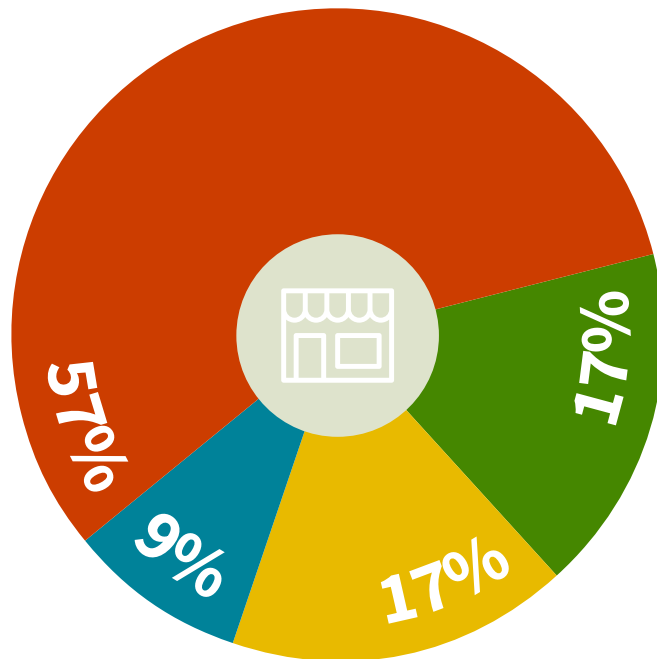
What's in the sandwich aisle?



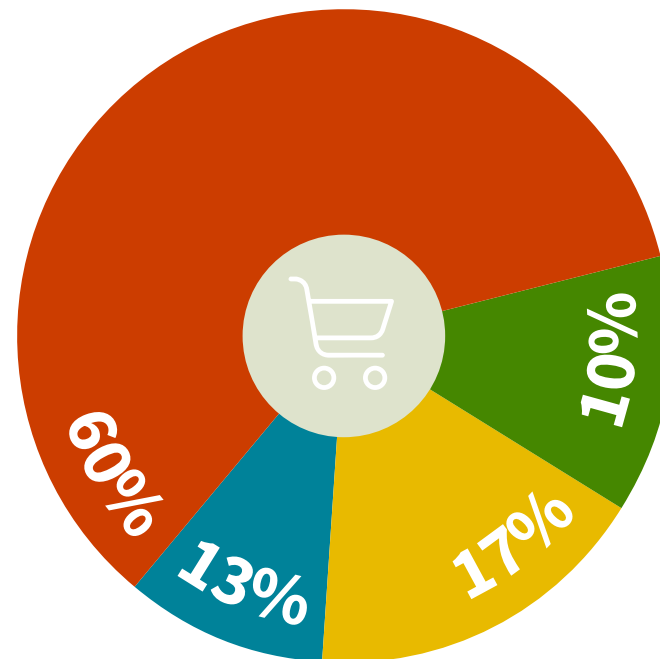
1. Is there a good balance of sandwich options?

Food service: third of the offer meat-free

Breakdown of sandwich options
across food service



Breakdown of sandwich options
across food retail



Meat



Fish



Vegetarian



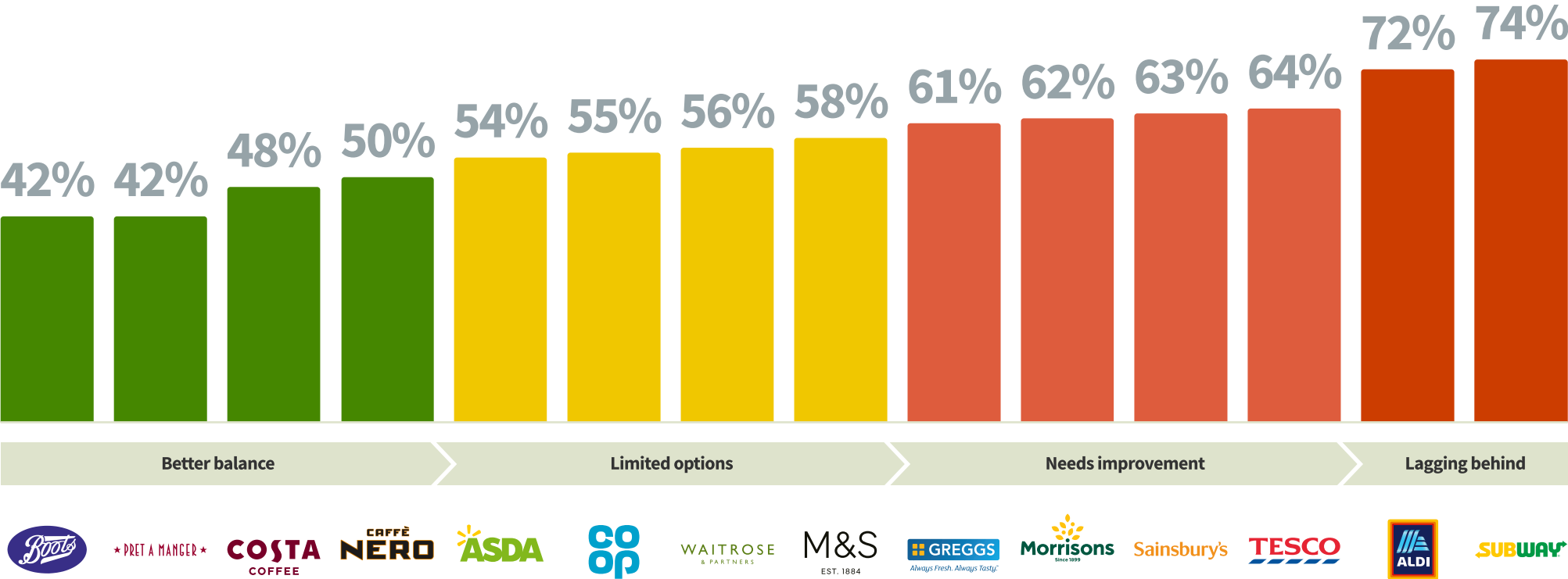
Plant-based



1. Is there a good balance of sandwich options?

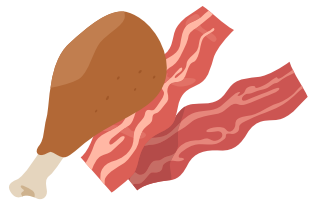
Food retail: still too meaty

% of the range that is meat-based 2022



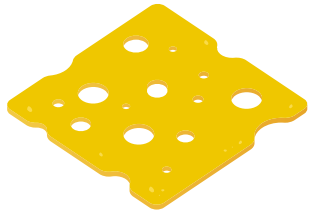
1. Is there a good balance of sandwich options?

Most popular fillings: chicken, cheese and pork



87%

Chicken and pork account for 87% of the meat sandwiches.



38%

Cheese is still the most popular filling in meat-free sandwiches at 38%



1/4

Alternative protein now makes up a quarter of meat-free sandwiches.

What fillings are in meat sandwiches? ¹⁴

48%



Chicken

39%



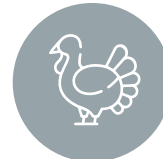
Pork

8%

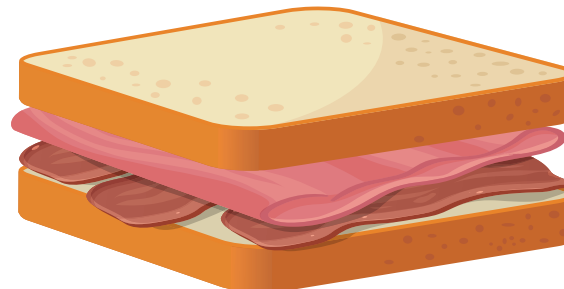


Beef

4%



Duck & Turkey



What fillings do vegetarian and plant-based sandwiches have?

38%



Cheese

25%



Alternative Protein

16%



Egg

11%

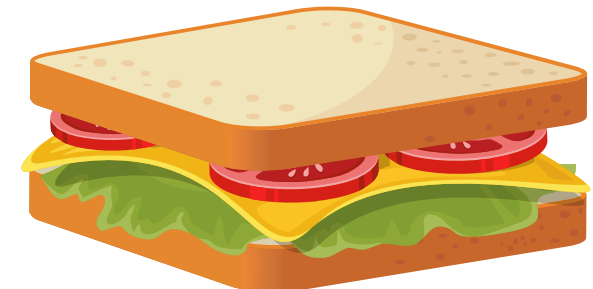


Pulses

10%



Vegetables



1. Is there a good balance of sandwich options?

The rise of alternative protein



+620%

increase in plant-based fillings as a core ingredient of meat-free sandwiches since 2019

+22%

Alternative protein fillings have shot up from only 3% of the vegetarian and plant-based range in 2019 to 25% now.

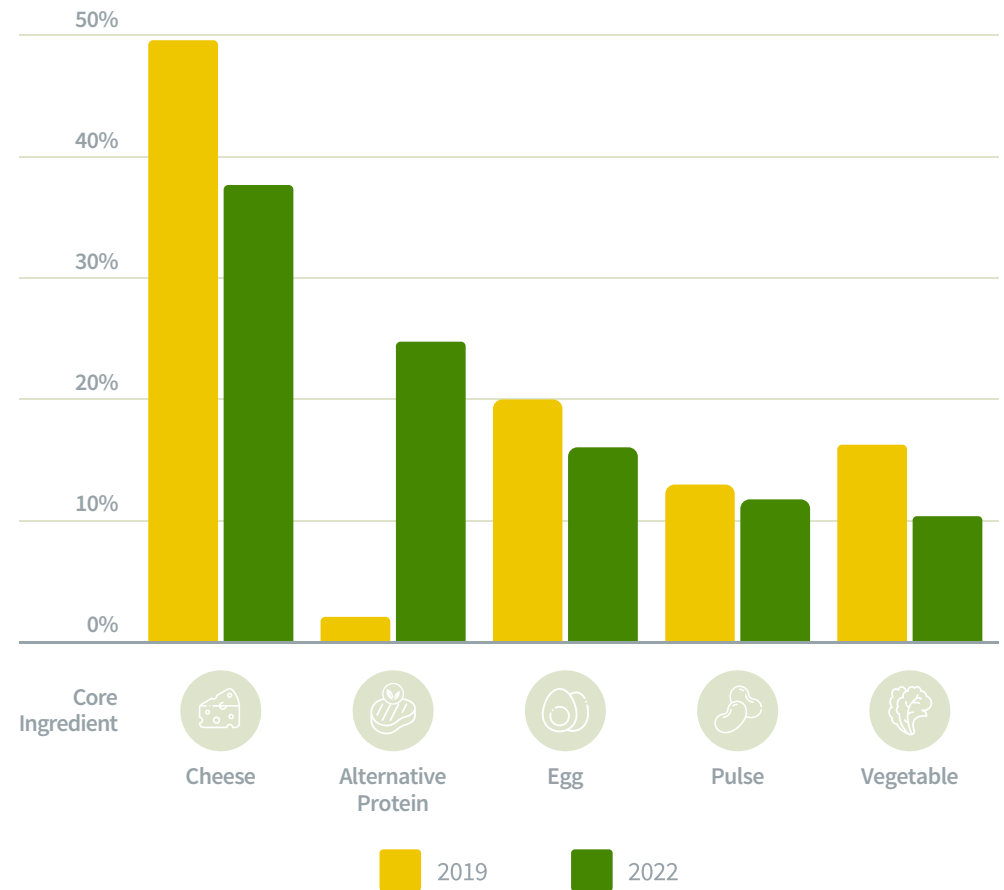


Examples of fillings include mushroom meatballs, Quorn, THIS Isn't Chicken, own-brand soya-based mycoprotein and pea protein pieces, and coconut oil based cheese alternative.



The huge growth of alternative protein is replacing other vegetarian options, but it is not having an impact on the amount of meat sandwiches on offer, which remains largely unchanged.

What fillings do vegetarian and plant based sandwiches have?



1. Is there a good balance of sandwich options?

Are these options healthy?

Of the sandwiches we surveyed

13%
are high in fat

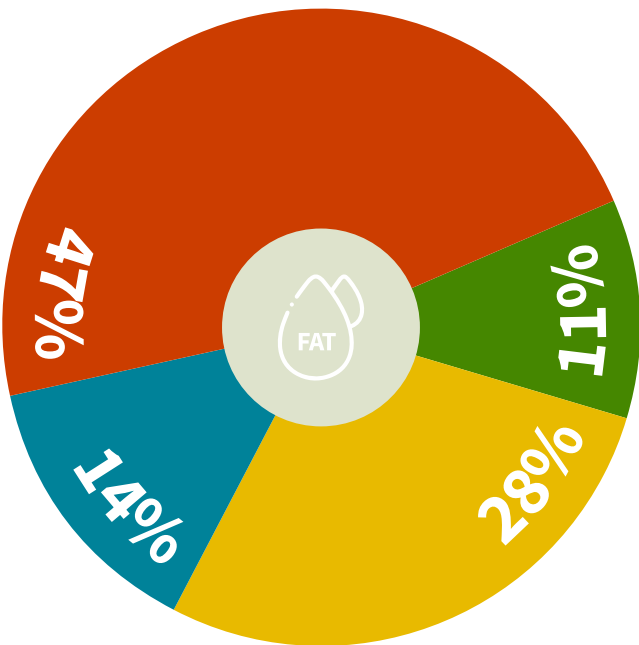
33%
are high in salt

37%
of meat sandwiches are high in salt, compared to

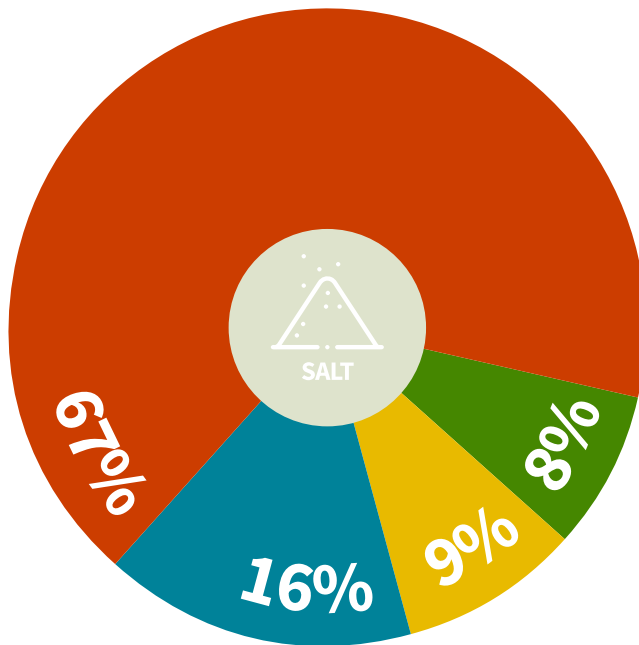
22%
of plant-based sandwiches.

Meat is the most common filling in high salt and in high fat sandwiches.

Sandwiches high in fat, by sandwich type



Sandwiches high in salt, by sandwich type



Meat



Fish



Vegetarian



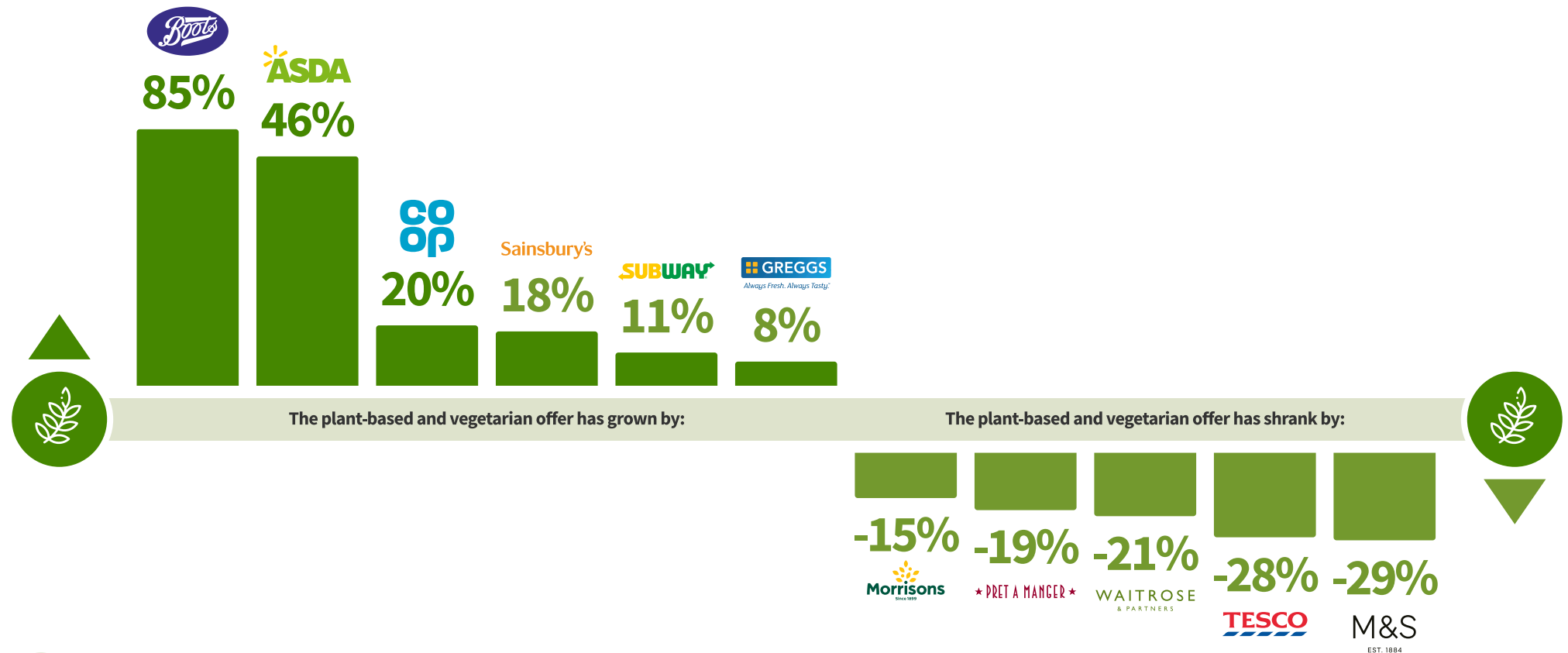
Plant-based



2. Are retailers improving their meat-free offer?

Meat-free options removed by some retailers

% change in meat-free sandwiches as a proportion of the range vs our 2019 survey



2. Are retailers improving their meat-free offer?

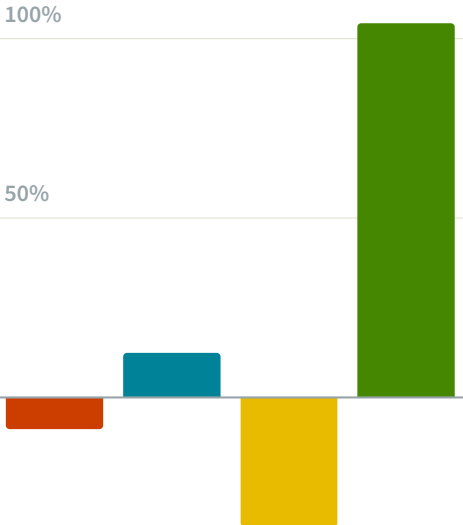
More plants on sandwich shelves at The Big Four?

% change in available sandwich types as proportion of total offering 2019-2022



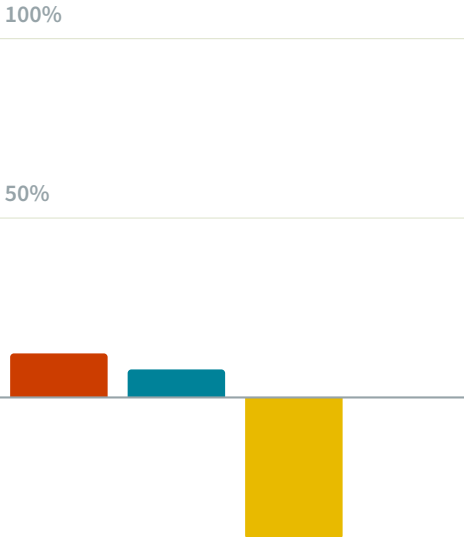
Sainsbury's

Sainsbury's has doubled its plant-based offer since 2019, from 8% to 16% of their total range.



TESCO

Tesco has as many plant-based options now as in 2019, but their vegetarian sandwich range has shrunk by 48%.



Meat



Fish



Vegetarian

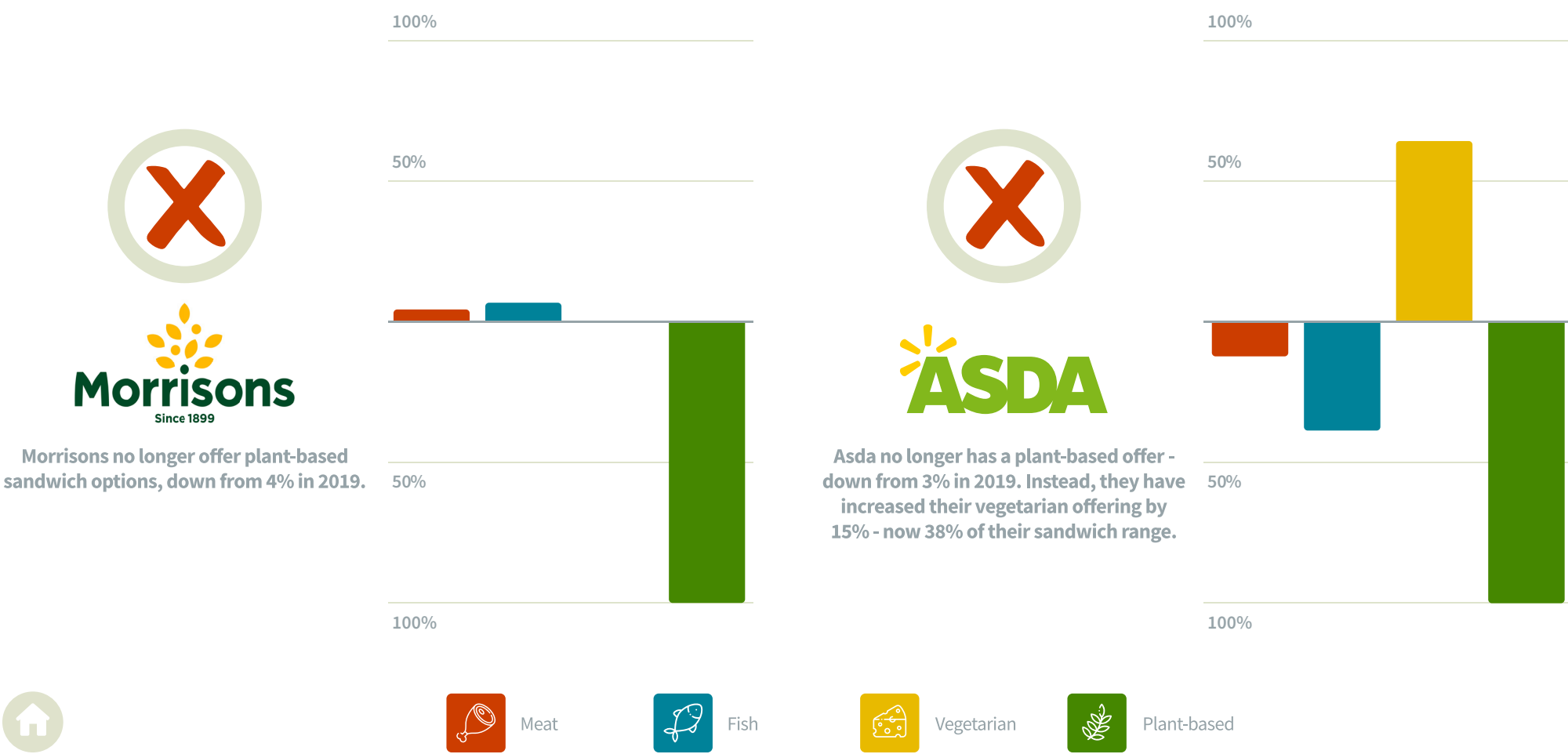


Plant-based

2. Are retailers improving their meat-free offer?

More plants on sandwich shelves at The Big Four?

% change in available sandwich types as proportion of total offering 2019-2022







3. Are retailers encouraging sales of plant foods?

Plant-based still too pricey

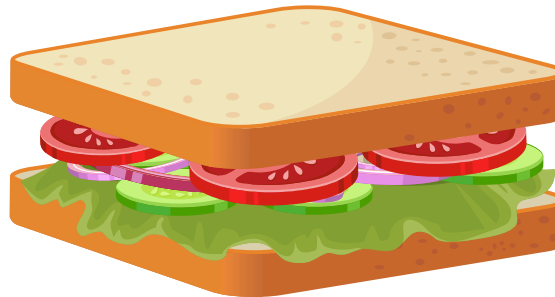
Plant-based sandwiches are, on average, the most expensive - they cost 8% more than meat options. Pricing plant-based products competitively is a key strategy to help people make healthier, more sustainable choices.

We found no plant-based sandwiches available to buy at Morrisons, Asda or Waitrose.

Meat		£3
Fish		£2.85
Vegetarian		£2.48
Plant-based		£3.25

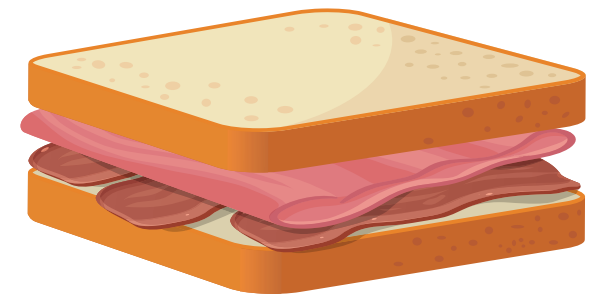
Average sandwich price

Are plant-based sandwiches cheaper or more expensive than meat sandwiches?



M&S <small>EST. 1884</small>	-23%
GREGGS <small>Always Fresh. Always Tasty.</small>	-21%
COSTA <small>COFFEE</small>	-13%

Plant-based sandwiches are % cheaper than meat



SUBWAY	+7%
* PRET A MANGER *	+9%
Boots	+10%
Sainsbury's	+15%

Plant-based sandwiches are % more expensive than meat



Spotlight on The Big Four

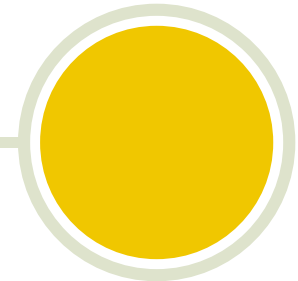
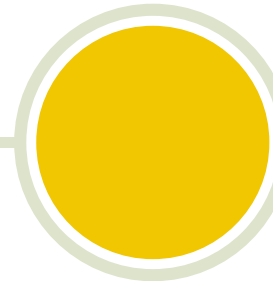
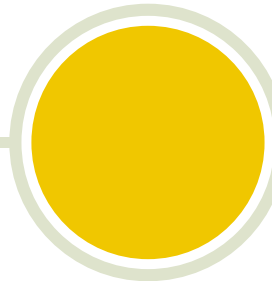
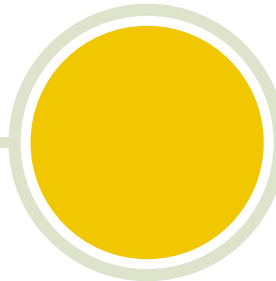
TESCO

Sainsbury's

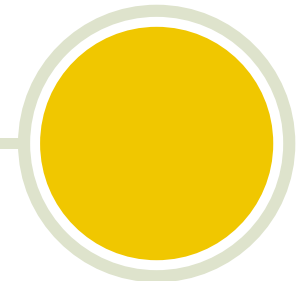
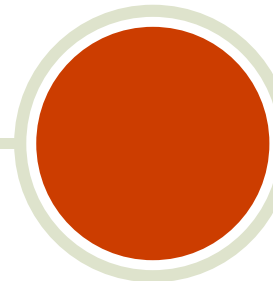
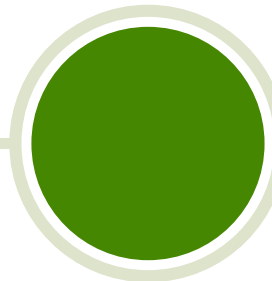
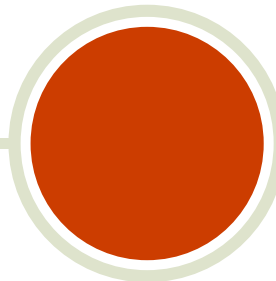
Morrisons
Since 1899

ASDA

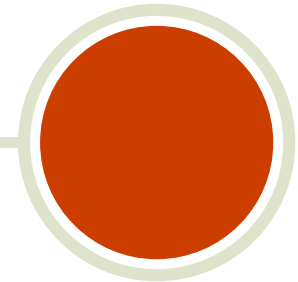
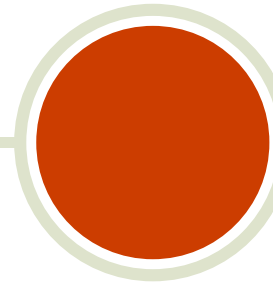
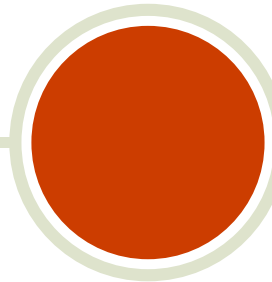
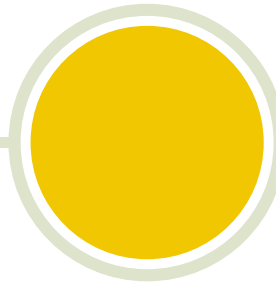
Is there a good balance of options available to buy?



Are retailers improving their offer to include more meat-free foods?

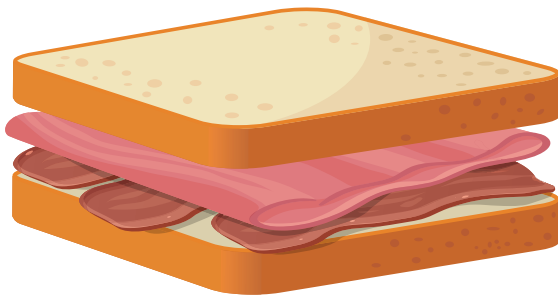


Are retailers encouraging sales of plant-based foods, i.e. pricing?

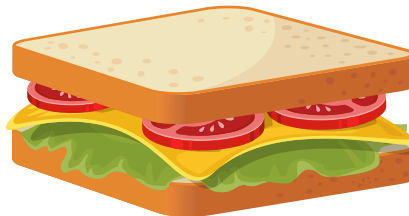
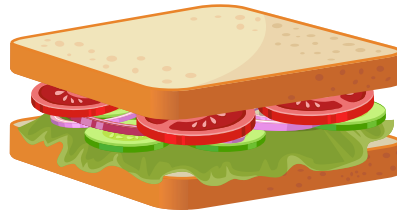


How can retailers do better?

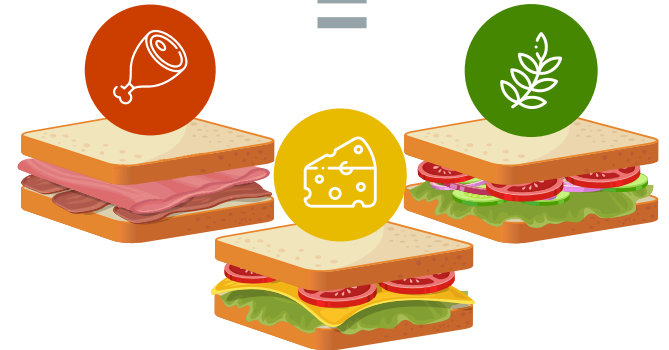
**50%
or less**



Reduce meat-based options, so that they make up 50% or less of the sandwich range.



Reduce cheese content and increase the amount of healthier fillings, like vegetables and pulses.



Price plant-based sandwiches competitively against meat, fish and vegetarian options.

Methodology



Our sample

This year's snapshot survey includes 430 sandwiches available to buy in 14 UK high street retailers in February 2022. We collected online data from retailer websites and, where this was not possible, through in-store fieldwork. The online and fieldwork sets of data were added together and analysed by Eating Better.

Data for M&S, Caffè Nero, Boots and Greggs was collected through in-store fieldwork. Two large outlets in London were visited for each retailer, and each store was visited on two separate dates. Data for Costa, Subway and Pret a Manger was collected manually from company websites. Each store's website was visited on two separate dates.

Data for Aldi, Tesco, Morrisons, Asda, Waitrose, Co-op and Sainsbury's comes from foodDB, a comprehensive, real-time database of food and drink products available online in the UK, developed at the Nuffield Department of Population Health, University of Oxford. With a focus on products available to buy online in all major UK supermarkets, foodDB currently collects information on over 120,000 food and drink products every week. It uses big data techniques for collection, processing, storage and analysis of available products, making it a powerful tool to track and evaluate changes in the marketplace¹⁵.

Ocado, Iceland and Lidl are out of scope as we did not find any sandwiches for sale.

We asked all retailers included in the survey about any recent changes they have made, or plan to make, to their lunch-to-go categories to increase vegetarian and plant-based options for customers, as well as any new initiatives or plans to support customers in choosing healthier and more sustainable foods.

Our analysis

We included any ready-to-eat sandwiches, baguettes, wraps, sub rolls, focaccia, baps or toast. We excluded products that require heating.

The ingredients text for each product were used to classify it into one of four categories: 'meat', 'fish', 'vegetarian', or 'plant-based'. Vegetarian products may contain eggs or dairy products, but no meat, fish or seafood. We defined plant-based products as those either labelled as suitable for vegans or which did not appear to contain animal products on the label. Ingredients' lists were also used to identify main ingredient (listed first), including type of meat (beef, lamb, pork, chicken, turkey, duck) and cheese. Ingredients list were also used to identify whether products contained a particular ingredient, in any amount. We also recorded prices and special offers.

We used the Department of Health & Food Standards Agency Front of Pack (FoP) traffic light nutrition label guidance¹⁶ to define high salt and high fat levels in products, as products containing >1.8g salt per serving and >21g total fat per serving respectively.

Graph figures are rounded to the nearest unit. When comparing figures with our 2019 sample, we use percentage change rate unless otherwise stated. Note our 2019 survey included Eat and Iceland, but not Aldi, Caffè Nero or Costa. Our 2019 sample included 630 sandwiches.

We classified Costa, Caffè Nero, Greggs, Pret a Manger and Subway as food service retailers. We classified Tesco, Sainsbury's, Morrisons, Waitrose, Asda, Co-op, Aldi, M&S and Boots as supermarkets.

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Who we are

Eating Better is a movement for change of sixty organisations working to accelerate the transition from producing and eating too much meat and dairy to a fairer, healthier and more sustainable food system that is better for the environment, our health, for land use, animal welfare and social justice.

Acknowledgements

This survey was prepared by Lachlan McKessar and Elena Salazar at Eating Better and, for data from foodDB, Dr Richard Harrington at the Nuffield Department of Population Health, University of Oxford. The report was written by Elena Salazar, Lachlan McKessar and Carole Mitchell at Eating Better. Design Andrea Milani at [PatchStudio](#).

Published June 2022

foodDB is funded by the [Biomedical Research Centre](#) at the University of Oxford.

Tracking progress

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Company registration number: 9772128

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