

# Sandwiches Stack Up



## Introduction

It's a good time for sandwiches in the foodservice world. With fast casual still gaining market share, consumers looking for fresh, healthful, affordable meal options at all dayparts and chefs getting more and more creative with the form, sandwiches are a hot commodity, whether served cool or warmed. Nearly three out of four sandwich shop customers indicate that sandwiches from sandwich shops are generally healthier than "regular fast food," and 67% indicate the food is fresher at these shops.

Fresh and healthy are two key consumer drivers in foodservice decision making, putting sandwiches in a good position for growth. No surprise to see that sandwiches are up in menu mentions by 12% overall since 2008.

Meanwhile global and American regional influences are showing up in new ways, bringing more range in ingredients and flavors to sandwich menus. In fact, every element of the sandwich, from bread to meats, is getting gourmet treatment, and this report deconstructs the sandwich layer-by-layer to examine the most-menus meats, cheeses, vegetables, sauces/condiments, breads and other extras, as well as some of the more cutting edge examples of what can go between bread carriers. Whether perfecting deli classics or creating whole new variations on the form of sandwiches, chefs are pulling out all the stops to give the Dagwood a good name.

## Building Off a Bread Base

While most sandwiches are more elaborate than a simple two-parts-bread to one-part filling ratio, the bread component can be doubly important to sandwich building. Picking the right carrier for the fillings—which can range from spicy and rather dry to downright saucy—takes some careful consideration. In fact, many classic sandwiches depend on the right bread: the muffaletta and the classic New England lobster roll are two examples.

There has been growth in crusty, hearty breads and rolls like ciabatta and baguettes over the past few years, while flat breads and panini-ready slices have been on the rise as pressed sandwiches gained steam.

Biscuits show a 57% growth, boosted by the proliferation of breakfast sandwiches in QSR and by the many chicken and biscuit sandwiches that have been added to chicken concepts.

Heartier, darker breads, like rye, wheat, and some of the specific grain breads, are coming on strong indicating that heartier, wholesome bread components will continue to influence sandwich development.

## The Meat of the Matter

A majority (60%) of sandwich shop users consider the quality of meats when choosing a sandwich shop. And in sandwiches, where one might expect sliced deli meats to rule, the list of most-menus protein shows chicken on top, which is no surprise given how most quick-service burger restaurants have been flocking to chicken sandwiches as a way to help offset rising beef costs. Black Angus beef shows a corresponding dip in menu incidences, down 23%.

Also of note is the way white chicken meat has grown 62% since 2008, which means operators are aware of consumer demand for higher quality meat. Expect chicken sandwiches to continue to soar.

### Top 20 Sandwich Breads

		% Change '08-'11
1	Roll	18
2	Flat Bread	14
3	Bread	14
4	Bun	-3
5	Wheat	19
6	White	4
7	Rye	20
8	Dough	26
9	Ciabatta	5
10	Bagel	19
11	Italian Bread	5
12	French Bread	-19
13	Croissant	10
14	Biscuit	57
15	Baguette	31
16	Bread Crumbs	17
17	Panini Bread	31
18	Grain Bread	75
19	Sourdough Roll	-21
20	Whole Grain	-18

### Top 20 Sandwich Meats

		% Change '08-'11
1	Chicken	6
2	Bacon	23
3	Beef	17
4	Ham	13
5	Turkey	15
6	Salami	19
7	Pepperoni	14
8	Sausage	26
9	Meat	23
10	Pork	43
11	Meatball (Beef)	-4
12	Corned Beef	21
13	Capicola	5
14	Pastrami	29
15	Chicken (White Meat)	62
16	Italian Sausage	26
17	Genoa Salami	6
18	Black Angus Beef	-23
19	Mortadella	4
20	Bologna	0



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# Culinary Trends

## Pork Pulls its Weight

Everything tastes better with bacon, and sandwiches are no exception. BLTs may help contribute to bacon's number two spot of most menued meats, but this crisp, salty treat also gets a supporting role in many sandwiches, such as McDonald's premium chicken line and many of the breakfast sandwiches in QSR and fast-casual settings.

## Meat-Free Ideas

While exceptional meat-free sandwiches are hard to come by on mainstream sandwich menus, independent restaurants and smaller chains have some ideas for skipping the meat in ways that will appeal to vegetarians, flexitarians and omnivores alike. Often, chickpea forms and other legumes fill in for meat.

Falafel is growing beyond its street-cart status to become a viable veggie option on some emerging chains, such as Garbanzo Mediterranean Grill, which offers falafel (as well as hummus) in pita bread and laffa wrap sandwiches. Maoz, a European chain entering the U.S. market in urban settings and near college campuses, is completely vegetarian and specializes in falafel ball pita sandwiches, topped with salads and served with Belgian-style fries.

## Cheese Gets A Grilling

A third (33%) of sandwich shop users consider the quality of cheese when choosing a sandwich shop. The list of top 10 cheeses most used on sandwiches does not show many surprises; standards like provolone, Swiss, cheddar and American have dominated over the past three years and continue to show steady growth, while Pepper Jack and Bleu showed the most significant gains over the last year.

The big news in cheese and bread is the popularity of grilled cheese, a kids' classic that has gone upscale in almost every restaurant segment; it's served alongside roasted tomato soup as a starter in fine dining or in mobile units throughout Los Angeles. While grilled cheese sandwiches may not fit every restaurant setting or kitchen operation, the way chefs and operators are mixing upscale cheese and creative condiments can inspire some more inventive cheese ideas for hot and cold sandwiches. In fact, many of these grilled cheese creations beg the question, when does a grilled cheese become a grilled sandwich? When meat gets added?

### Top 10 Sandwich Cheeses

		% Change '08-'11
1	Provolone	14
2	Swiss	15
3	Cheddar	18
4	American	11
5	Mozzarella	5
6	Pepper Jack	29
7	Parmesan	23
8	Feta	26
9	Monterey Jack	-4
10	Bleu	84

### Top 20 Sandwich Condiments

		% Change '08-'11
1	Mayonnaise	7
2	Mustard	12
3	BBQ Sauce	58
4	Tomato Sauce	-5
5	Marinara Sauce	23
6	Sauce	-16
7	Honey Mustard Sauce	3
8	Ketchup	59
9	Au Jus	20
10	Buffalo Sauce	21
11	Pesto Sauce	65
12	Hellmann's Real Mayonnaise	20
13	Tartar Sauce	11
14	Yellow Mustard	-5
15	Dijon Mustard	-12
16	Horseradish Sauce	67
17	Aioli Sauce	161
18	Gravy	-5
19	Salsa	5
20	Tzatziki Sauce	15

## Finishing Touches

Most cold sandwiches, especially subs, have a layer of fresh vegetables in the mix, but a search of those vegetables finds little beyond the basic tomato, lettuce, onions, peppers and pickles. It's time for operators to tune in to produce's growing appeal and healthy halo and offer better options. Avocados add creaminess and better health as a sandwich spread. Roasted vegetables are another great way to add more produce, while artisan and craft-made pickles are on trend and sandwich friendly.

And, as for the final finishing touch, there are the condiments. A muffaletta would be just another cold cut sandwich without the distinct olive relish, a Cuban needs a good slather of mustard to make it authentic and a fried fish sandwich barely has flavor without a good tartar sauce. As with many dishes: it's the finishing sauces and extras that make them memorable. High impact flavors like barbecue sauce and pesto have growing appeal among restaurant operators. Even higher impact sauces, like horseradish and aioli (up a whopping 161%) are the big news in condiments.

Dressings and condiments are an easy step into global flavors as well. While many menus may not be ready for a fully authentic *banh mi*, bringing in pickled carrots and a lemon grass flavored mayo on a chicken sandwich is a good way to test the waters. Likewise, not every operation can have an authentic gyro carving station, but adding yogurt-and-cucumber-based *tzatziki* sauce is a fresh way to branch out into global flavors. After all, almost every culture has a sandwich variation, from Mexican *tortas* to French *tartines*, and often the difference between two sandwiches is a matter of sauerkraut or *kimchee*.



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