

Build a Better Sandwich

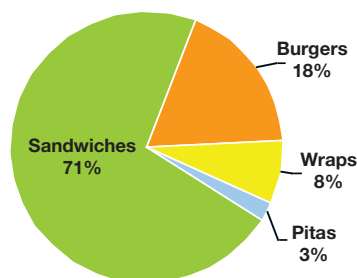
The great thing about the sandwich is this: there is no wrong way to make one. As long as your ingredients are sandwiched by some type of bread or really, any food that compliments and frames your core ingredients, you are good to go. The possibilities are endless.

Menu Movement

This trend report will focus only on sandwiches and does not include burgers, wraps or pitas. To put this into perspective, see how sandwiches stack up to its sibling, the burger, and its distant cousin, wraps and pitas. Sandwiches dominate this segment with over 70% of menu share, compared to burgers, wraps and pitas.

Sandwiches briefly declined in popularity when no-carb diets were widely in vogue, but they have since rebounded as no-carb diets became less prevalent in the U.S.

Share of the Sandwich Menu by Category

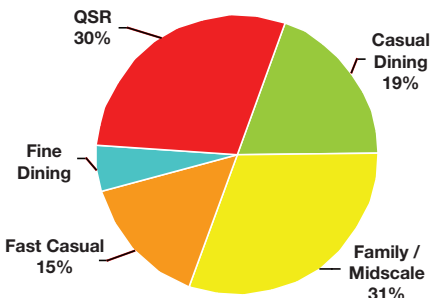


Sandwich Share

Family dining and QSR restaurants have the greatest share of sandwiches with about 30% each. Next is casual dining and then fast casual restaurants. Fine dining restaurants trail in this food category with only 5% of total share.

At first glance, the respective shares seem proportionately distributed. However, when we index to offerings against their overall menu shares we see a different picture. As shown in the table below, the share of sandwich menu held by fast casual and QSR's is twice as high as one would expect in proportion to their overall share of menu items. Family/Midscale is more in line with an index of 128. Casual and fine dining restaurants have a smaller share than expected.

Sandwich Share by Dining Type



Share of the Sandwich Menu by Category

Dining Type	Index
Fast Casual	206%
Quick Service Restaurant	201%
Family / Midscale	128%
Casual Dining	61%
Fine / Upscale Gourmet	23%



Top 10 Sandwich Breads

1. Bun
2. White Bread
3. Wheat Bread
4. Sub Roll
5. Tortilla (optional)
6. Sourdough Bread
7. Rye Bread
8. Roll
9. Focaccia Bread
10. Hoagie Roll

Top 10 Flavors in Sandwiches

1. Smoked
2. Honey
3. Garlic
4. Spicy
5. Sesame Seed
6. Parmesan Cheese
7. Herb
8. Onion
9. Sun-Dried Tomato
10. BBQ

Top 10 Sandwich Proteins

1. Chicken
2. Bacon
3. Beef
4. Ham
5. Turkey
6. Egg
7. Salami
8. Pepperoni
9. Sausage
10. Meat (unspecified)

Top 20 Sandwiches by Share

1. Chicken
2. Turkey
3. Breakfast - Sandwich
4. Club
5. Roast Beef
6. Grilled Cheese
7. Ham and Cheese
8. Italian
9. Steak
10. BBQ
11. Vegetable
12. Meatball
13. Cheese steak
14. B.L.T.
15. Ham
16. Tuna
17. Grilled Chicken
18. Fish
19. Tuna Salad
20. Chicken Salad



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Sandwich Building Blocks

One trend we see consistently across many new sandwiches is the use of complex ingredient builds to create a new taste. Various types of ingredients, cooking methods, and ethnic influences are fused to create new and exciting tastes. The average number of ingredients in sandwiches has steadily grown over the past few years, increasing by nearly 10% since Q1-2005. Today's sandwiches are built from about 8 ingredients.

Most new sandwiches can be considered Traditional American cuisine, but other sandwich types are also popular. Italian/Mediterranean and Southwest/Tex-Mex inspired sandwiches consistently average between 15-20% of all new sandwich introductions.

The following are examples of some new sandwiches:

The "Best" Breakfast Ciabatta - A hearty sandwich of bacon, ham, eggs, spinach, tomato and remoulade on toasted ciabatta - *Mimi's Café*

Cuban Sandwich - Slow-roasted Pork, Ham, Swiss Cheese, Pickles and Mustard on a Grilled and Pressed Cuban-Style Roll - *The Cheesecake Factory*

Albacore Tuna Sandwich - Tuna salad, cilantro leaves tomato and organic sprouts on a toasted croissant - fresh sliced avocado available. - *Claim Jumper*

Panini Pandemonium

The Panini is an example of increasing sandwich build complexity. Paninis involve grilling a sandwich so that the bread has ridges and the ingredients all melt and fuse together. Paninis are unique to their maker and all have their own twist. These sandwiches are customized based on a variety of meats, cheeses, spices and ethnic influences. Paninis can be built as a light snack, lunch, or a more substantial dinner offering. Given this versatility, expect continued growth in new panini offerings.

The following are examples of paninis on the menu:

It's All Greek to Me Panini - Chicken, spinach, kalamata olives, pesto, tomatoes, caramelized onions, mozzarella and feta - *Uno Chicago Grill*

Tomato Basil Focaccia Panini - Heirloom tomatoes, Woodstock buffalo mozzarella, basil, garlic aioli, and balsamic vinegar - *The Putney Inn*

Caribbean Jerk Chicken - Marinated Spicy-sweet chicken and tomatoes, homemade tropical island spread, and Romaine served on a signature Panini bread - *Salad Works*

Turkey Habanero - Focaccia bread, turkey breast, cheddar, roasted red peppers, red onion, mango-habanero dressing - *Camille's Sidewalk Cafe*

Top 5 Sandwich Breads in New Menu Items

1. Ciabatta Bread
2. Panini Bread
3. Focaccia Bread
4. Sub Roll
5. Wheat Bread

Top 5 Sandwich Cheese in New Menu Items

1. Swiss
2. Provolone
3. Cheddar
4. American
5. Mozzarella

Top 10 Sandwich Sauces

1. Mayonnaise
2. Mustard
3. Tomato Sauce
4. BBQ Sauce
5. Sauce
6. Marinara Sauce
7. Honey Mustard Sauce
8. Buffalo Sauce
9. Ketchup
10. Au Jus

Top 10 Sandwich Ingredients Nutritional Claims

1. Low-Carb
2. Low-Fat
3. Lean
4. Fat-Free
5. Light (Nutritional)
6. Reduced-Carb
7. Natural
8. Choice
9. Organic
10. Non-Fat

Top 10 Premium Sandwiches

1. Stead
2. Roast Beef
3. Club
4. Grilled Chicken
5. Chicken
6. Turkey
7. Crispy Chicken
8. Tuna Salad
9. Ham
10. Ham and Cheese

Top 10 Breakfast Sandwiches

1. Breakfast Croissant
2. Ham and Egg
3. Breakfast Biscuit
4. Bacon and Egg
5. Sausage, Egg and Cheese
6. Ham, Egg and Cheese
7. Egg
8. Ham and Cheese
9. Breakfast B.L.T.
10. Hot Cakes Sandwich



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