



The British Sandwich Market planning for growth

A British Success Story – Key Dates

- Founded by Earl of Sandwich 1762
- 1980 M&S launched first packaged sandwiches
- 1990 Commercial sandwich sales topped £1 billion

In the last year:

Sandwich sales
£7,250,000,000*

+ 6%

Sandwiches
sold =
3,500,000,000*

+ 2%

300,000+
Jobs in the UK

*Source: BSA/Kantar



Sandwich Bars	32%
	13%
Staff/work canteens etc.	
Coffee bars	11%
Multiple Supermarkets	10%
	7%
Pubs/Hotels	
	3%
Newsagents	
	4%
Conferences/meetings	
	2%
Garage forecourts	
	2%
Schools and education	
	1%
Symbols/Convenience stores	
	1%
Hospitals/healthcare	
	15%
Other	
Source: BSA/Kantar - Volume (packs)	

Who has what share?

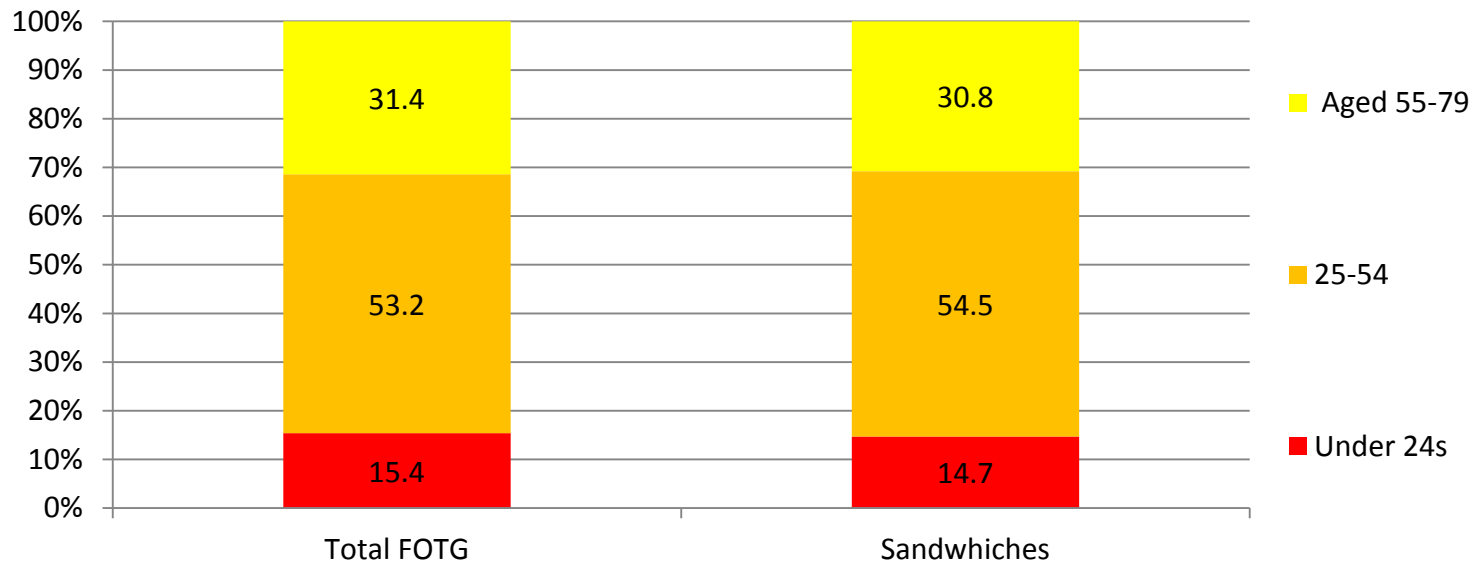
EVERYONE BUYS SANDWICHES, BUT THERE IS A BIAS TOWARDS MALES, UPMARKET SHOPPERS AND THOSE OF WORKING AGE



DEMOGRAPHIC PROFILE - % SPEND

57% Males
(vs 53% Total FotG)

68% ABC1
(vs 65% Total FotG)



Source:

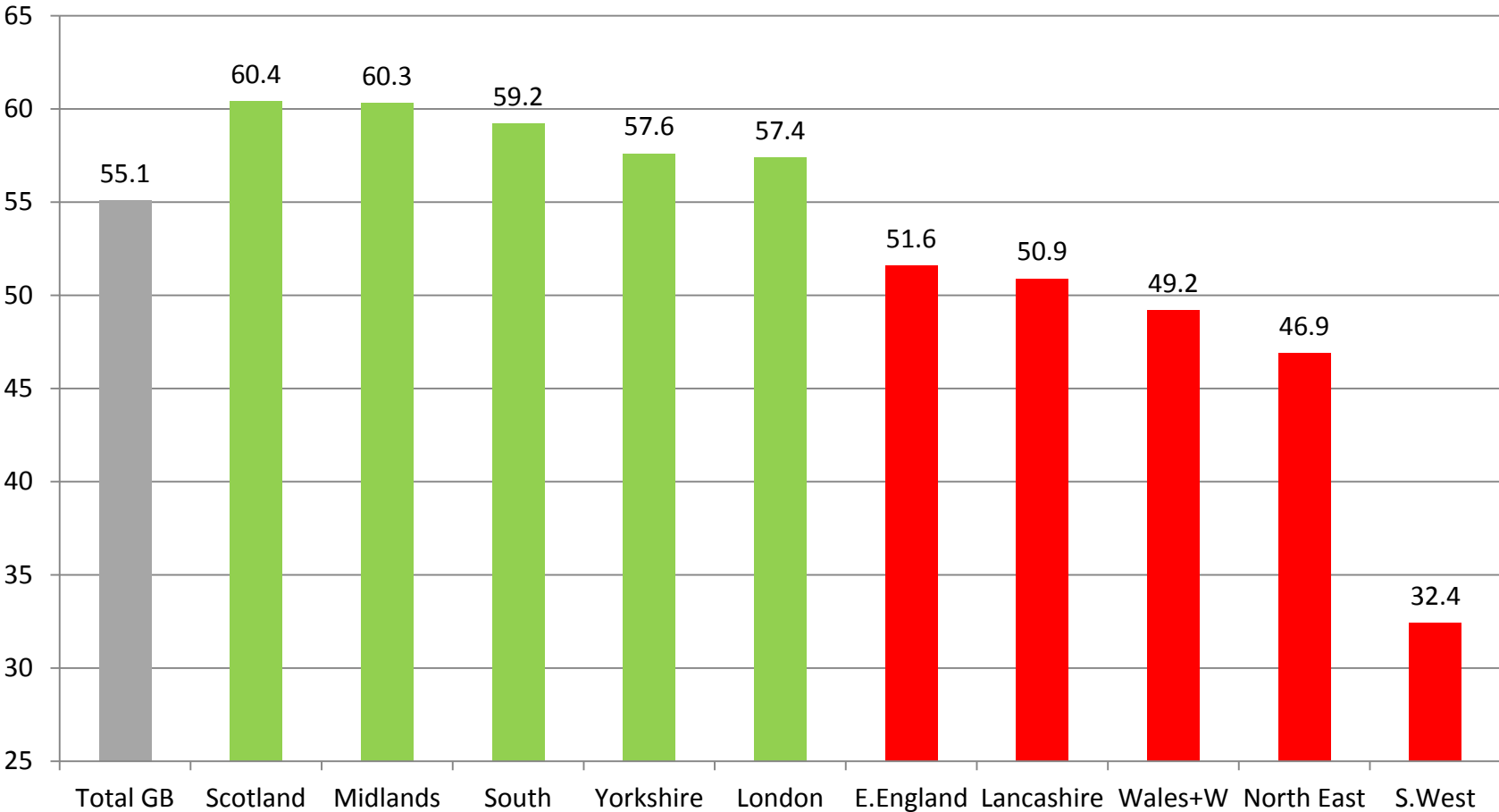
KANTAR WLTIRLOPANEL

52 w/e 2 March 2014

THE AVERAGE SHOPPER BUYS JUST OVER 1 SANDWICH A WEEK – MORE IN SCOTLAND AND MIDLANDS ESPECIALLY.



POPULARITY BY REGION – NUMBER OF PACKS BOUGHT EACH YEAR PER INDIVIDUAL



Source:

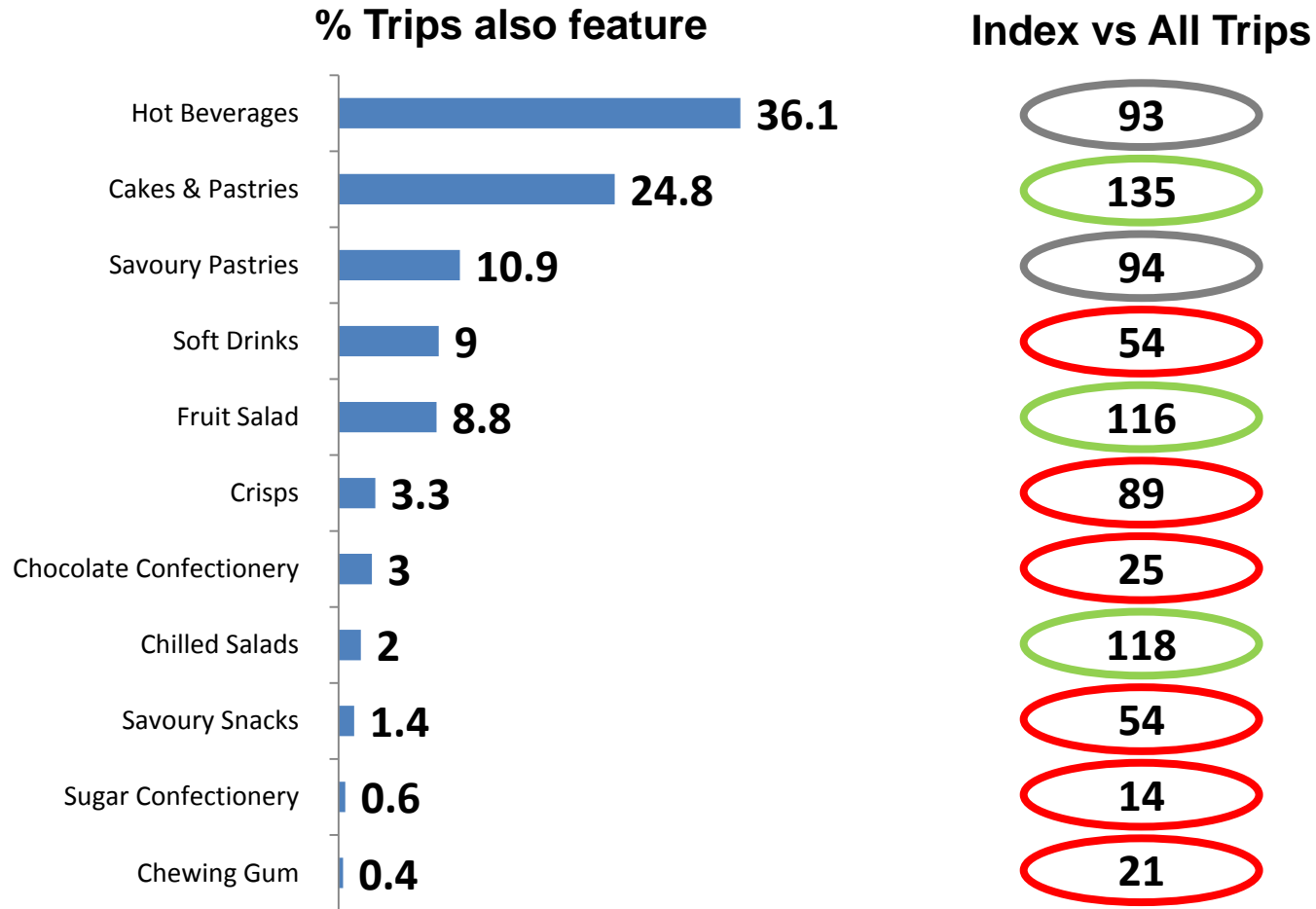


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OVER 1/3 OF SANDWICH TRIPS ALSO FEATURE HOT DRINKS BUT A STRONG OVERINDEX FOR CAKES & PASTRIES TOO



WHAT ELSE ARE SANDWICHES PURCHASED WITH? - % TRIPS ALSO FEATURING



Source:

KANTAR WLTORLDPANEL

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Chicken Tops Favourites

Top 12 sandwich fillings



Chicken	31%
Cheese	13%
Ham	11%
Egg	10%
Prawn	6%
Tuna	6%
Bacon	5%
Breakfast	5%
Ploughmans	3%
Salmon	3%
Beef	2%
Salad	2%

*Source: BSA/Kantar

% of sandwiches containing key ingredients

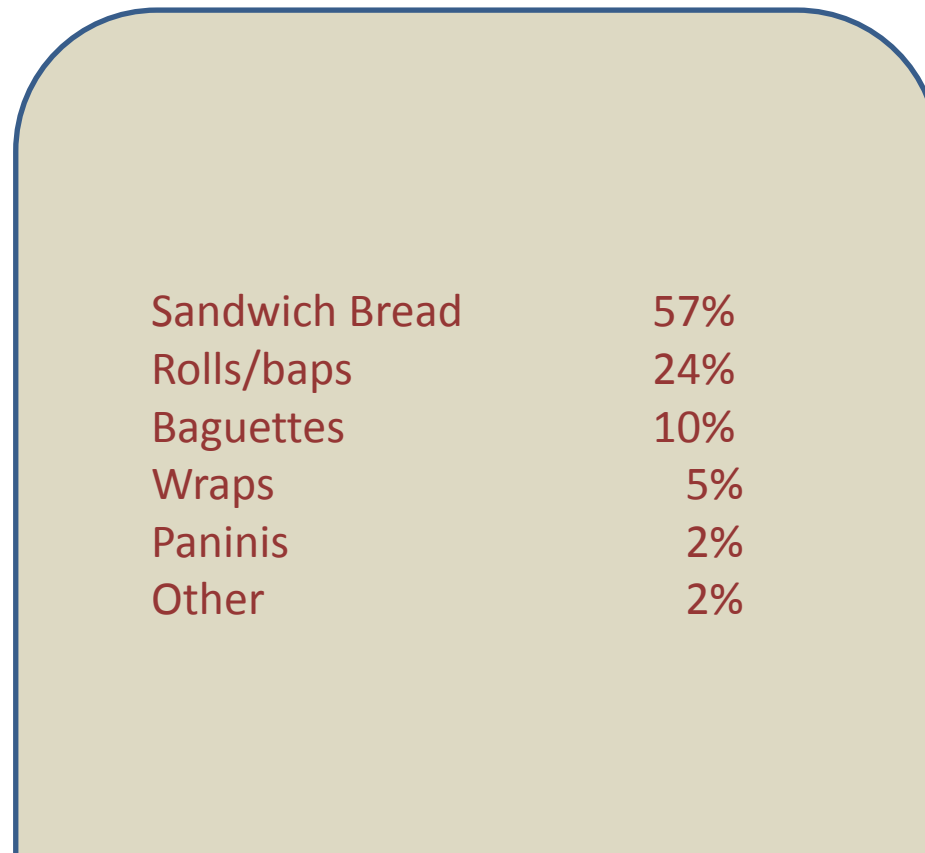
Ingredient Volumes Used by the Industry



	Tonnes
Bread	276,000
Chicken	43,000
Cheese	16,000
Ham	15,000
Eggs	14,000
Bacon	7,000
Prawns	6,250
Tuna	6,250
Salmon	3,000
Beef	2,750
Sausage	250

*Source: BSA estimates

Favourite Carriers



*Source: BSA estimates

What sells



Standard	76%
Healthy	11%
Premium	6%
Value	2%

*Source: Kantar

The market – Some Facts



Sandwich
Average
price
£2.07*

Penetration
75.5%*

Commercial
sandwiches
about 25%
of market

*Source: BSA/Kantar

The market – The Future



- **Growth through economic downturn**
- **Maturing market**
- **Industry focusing more on marketing**

The Launch



THE
LOVE

sarnies.com
SANDWICH CLUB



LOVE sarnies .com

-  Home
-  Find Sarnies
-  Win Stuff
-  Healthy Choices
-  About the BSA

Good for everyone



and £500 for a charity of your choice



The Taste Test

The quick brown fox jumps over the lazy dog The quick brown fox jumps over the lazy dog

The quick brown fox jumps over the lazy dog

The quick brown fox jumps over the lazy dog

Lunch Munch

The quick brown fox jumps over the lazy dog The quick brown fox jumps over the lazy dog

The quick brown fox jumps over the lazy dog

The quick brown fox jumps over the lazy dog

Mmm...

The quick brown fox jumps over the lazy dog The quick brown fox jumps over the lazy dog

The quick brown fox jumps over the lazy dog

The quick brown fox jumps over the lazy dog



NEW!

LOVE sarnies.com

DRIVING CUSTOMERS TO YOUR BUSINESS



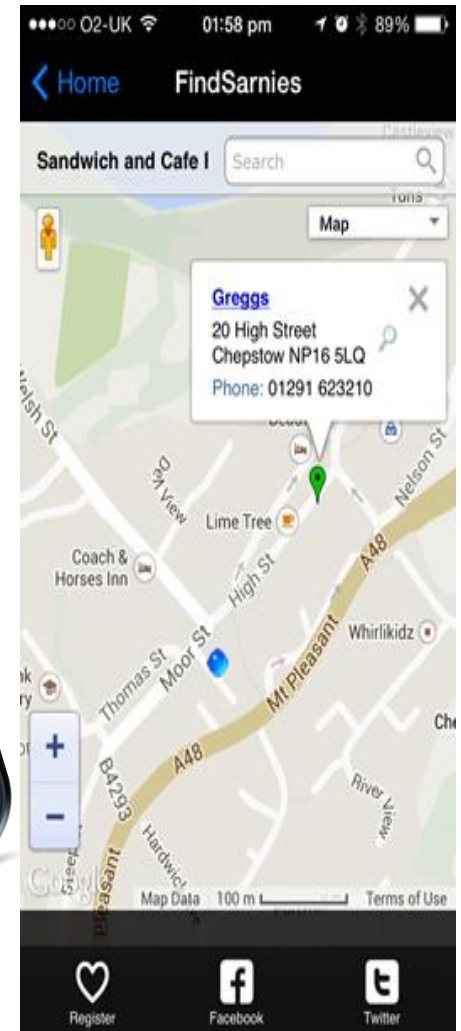
SANDWICH CLUB APP

Find Sarnies

Scan Code

Win Stuff


Download the app at www.lovesarnies.com



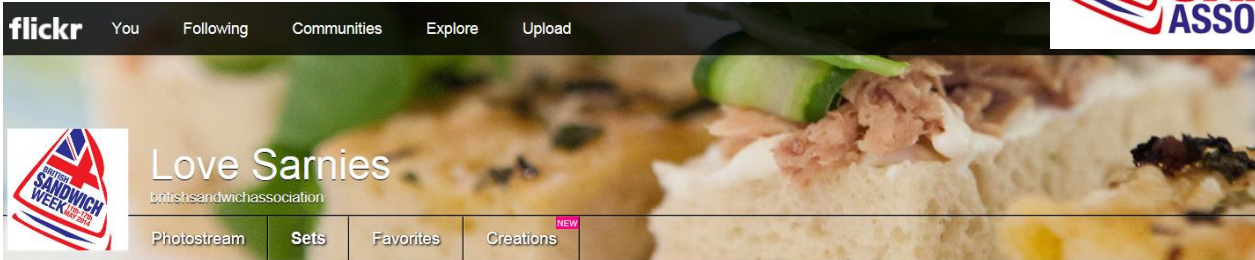
Social Media



flickr You Following Communities Explore Upload

 **Love Sarnies**
britishsandwichassociation

Photostream Sets Favorites Creations **NEW**



Home Notifications Discover Me


The BSA
@BritSandwich

TWEETS 80 FOLLOWING 528 FOLLOWERS 224

Compose new Tweet...

Who to follow · Refresh · View all


-  **Jonathan Foley** @GlobalEc...
Followed by Food Tank and o...
-  **BBC Good Food** @bbcgoo...
Follow
-  **delicious. magazine** @deli...
Follow


Popular accounts Find friends

Trends · Change

- #DammieCold Promoted
- RIP Tony Benn
- Lord Windermere

Tweets

 **Nancy's Tea Shop** @nancysteashop · 14 secs
What a sweet J&G Meakin Ironstone teapot! It's two but fortunately for me, I get... [fb.me/6UDN...](#)

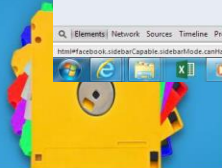
 **Brakes** @Brakes_Food · 45 secs
Have a wonderful weekend everyone, we'll see us then find contact details here [brake.co.uk/c...](#)

Followed by FROMM Packaging UK and BerryWhite.

 **HP UK** @HPUK · Mar 11
Save yourself time & money! #WindowsXP is n...
trade up to HP here: [ow.ly/usvGt pic.twitter.co...](#)

Promoted by HP UK

**Goodbye XP.
Hello HP.**
All good things must come to an end.



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Food/Beverages
Consumer promotional website from the British Sandwich Association

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Dear Spanish Drug Dealer,

125%



The
BRITISH
SANDWICH
ASSOCIATION