

PROVE IT 2026

THE TRENDS DRIVING SANDWICH CONSUMPTION



Délifrance
LIVE EVERYDAY DELICIOUS

WELCOME

CONTENTS

BITESIZE	4
MEGABITE	6
THE KEY TRENDS DRIVING SANDWICH PURCHASE AND CONSUMPTION	12
TREND #1: TASTE & FLAVOUR	12
TREND #2: QUALITY & VALUE	22
TREND #3: HEALTH	26
TREND #4: CONVENIENCE	28
TREND #5: SOCIAL MEDIA	30
BITE OCCASIONS	31
KEY TAKE AWAYS	40
TAKE A BITE OUT OF DÉLIFRANCE INSIGHTS	41
FINAL WORD	42
OUR RANGES	43



Stéphanie Brillouet

"Welcome to our first dedicated report on sandwiches, a category that remains a firm favourite across the UK and continues to win over more fans."

"Our research shows that half of consumers report eating sandwiches out-of-home more frequently than they did a year ago, a clear sign that this simple, versatile meal

is keeping pace with changing lifestyles. Far from being limited to lunch, sandwiches are now appearing across multiple dayparts, from breakfast to dinner, and increasingly serving as a convenient, satisfying option for busy households, young professionals, and on-the-go consumers alike.

"This report examines the trends driving the category's growth. Drawing on a survey of UK adults, Délifrance insight, and the expertise of food trends specialists Harris & Hayes. It highlights how taste, quality, convenience, health, and social media influence continue to shape consumer choices. Sandwiches are evolving in format and flavour, balancing innovation with familiarity, and offering both comfort and excitement.

"The sustained popularity of sandwiches reflects their ability to meet a wide range of needs: quick and convenient, indulgent yet affordable, familiar yet adventurous. As the market expands and consumer expectations rise, the sandwich has proven it is a resilient, dynamic, and tasty part of everyday life."

Stéphanie Brillouet, Marketing & Innovation Director, Délifrance



Lisa Harris and Alexandra Hayes

"We have collaborated on this report with food and drink trends consultants Harris & Hayes, combining their expertise with our comprehensive research. Harris & Hayes are one

of the UK's most trusted food consultants and future forecasters. Leading innovation projects for multinationals and challenger brands, Lisa Harris and Alex Hayes' expertise lies in identifying how early shifts in cultural and social behaviours manifest in food and drink. Look out for the 'H&H says' comments throughout this report"

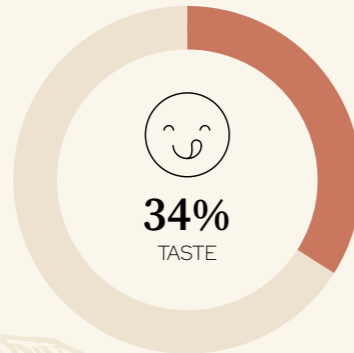
We surveyed _____

1,000 UK ADULTS WHO REGULARLY EAT SANDWICHES.

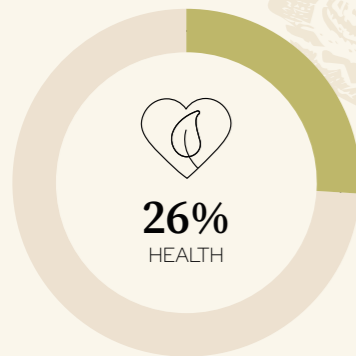
This report also makes use of Délifrance insights and the experience and views of food trends experts Harris & Hayes.

BITESIZE

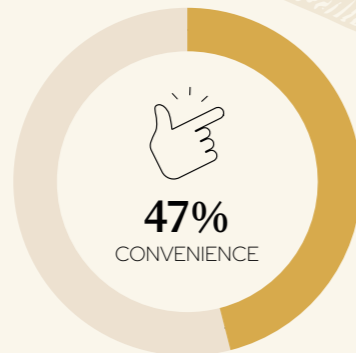
34% of consumers cite taste as the single biggest reason they choose one sandwich over another



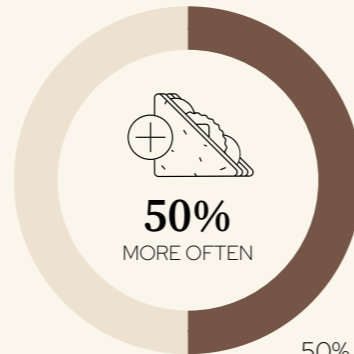
26% of consumers actively prioritise health when selecting a sandwich



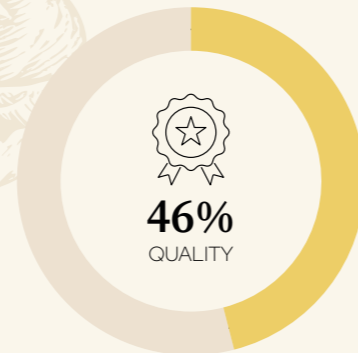
47% of consumers say convenience – ease and accessibility – is the main factor influencing where they buy their sandwich



KEY SANDWICH STATISTICS

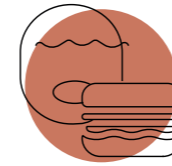


50% of consumers eat sandwiches more often than a year ago



46% of consumers say better quality is the main reason they are eating more sandwiches

THE TRENDS



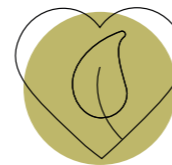
TASTE & FLAVOUR

Taste remains the primary driver of sandwich choice, with 34% of consumers citing it as the key factor. Freshness, balance of flavours, and quality ingredients are essential to delivering a satisfying experience. While classics continue to dominate, there is growing appetite for innovation, including new condiments, international fillings, and textural contrasts.



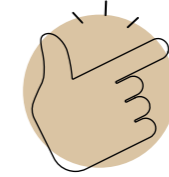
QUALITY & VALUE

Better quality is now a critical driver of sandwich consumption, with 46% of consumers reporting it as a reason they eat more. Customers seek generous fillings, artisanal breads, and visible freshness, while value is increasingly defined by the overall quality rather than price alone.



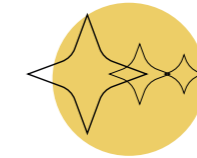
HEALTH

Health considerations influence sandwich choice for 26% of consumers, reflecting a broader wellness mindset. Shoppers seek tangible nutritional benefits such as fresh ingredients, high fibre, low fat, and energy-sustaining fillings. Health-led innovations encourage consumers to try new options and expand their repertoire.



CONVENIENCE

Convenience remains a key factor, with 47% of consumers prioritising ease and accessibility when choosing where to buy a sandwich. Routine, familiarity, and portability underpin consumer behaviour, as many prefer sandwiches that are easy to eat, and suited to busy lifestyles. Technology, pre-ordering, and elevated grab-and-go offerings enhance accessibility without compromising quality.



SOCIAL MEDIA

The latest flavour trends paired with beautiful images and videos make social media a powerhouse for sandwich discovery. Indulgent, hyper-visual creations tap into Gen Z's appetite for small, feel-good treats – especially at a time when bigger life milestones feel out of reach. This generation is willing to spend on standout moments, whether that's a decadent pastry, artisan loaf or an over-the-top sandwich.

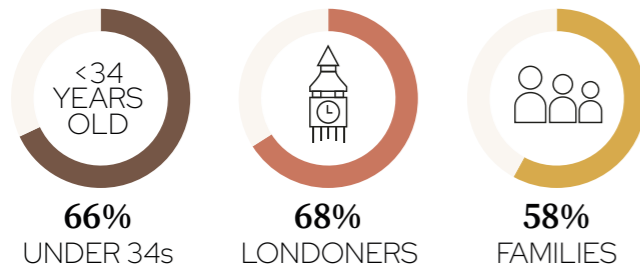


MEGABITE

OVERVIEW OF THE SANDWICH MARKET

The UK sandwich market is experiencing a period of renewed growth, driven by rising consumption, expanding dayparts and evolving expectations around quality and format. Half of consumers are now eating sandwiches more often than they were a year ago, a shift strongly linked to the perception that the quality of sandwiches available on the market has improved.

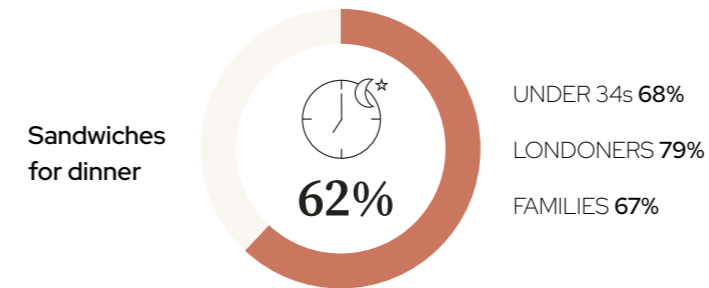
Sandwich lovers are eating more sandwiches than ever



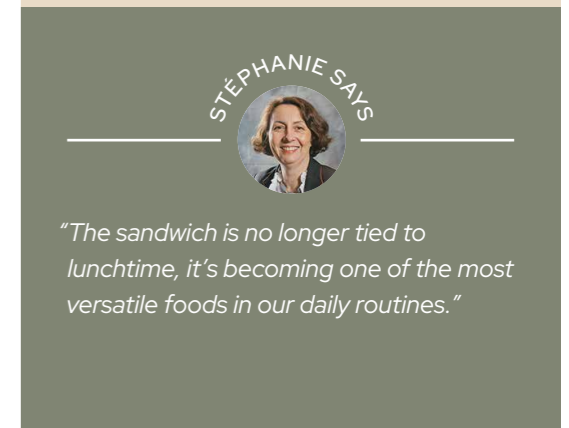
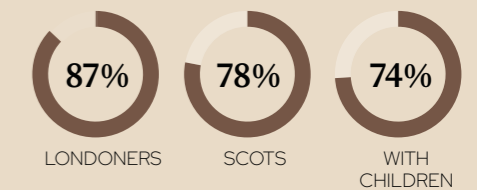
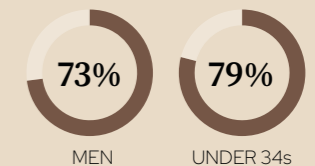
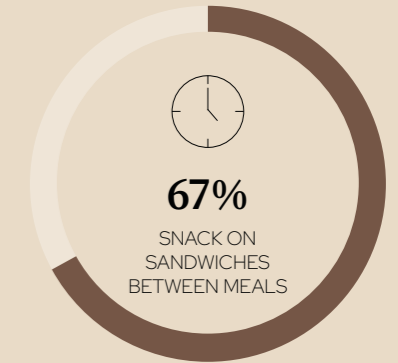
Only **one in five** report eating sandwiches less often, although women are more likely to fall into this group at 26%. **Younger consumers are especially enthusiastic, with 66% of under-34s eating sandwiches more often.** Regional differences also shape the picture: **Londoners are the most likely to say they're eating more sandwiches (68%),** while consumers in Wales are the most likely to say they are eating fewer (33%). Families play a large role too, with 58% of those with children increasing their sandwich consumption, highlighting the role of sandwiches as a convenient, multi-occasion staple. **Making more meals at home (39%) and poor value for money (39%) are the top reasons cited for eating fewer sandwiches.**



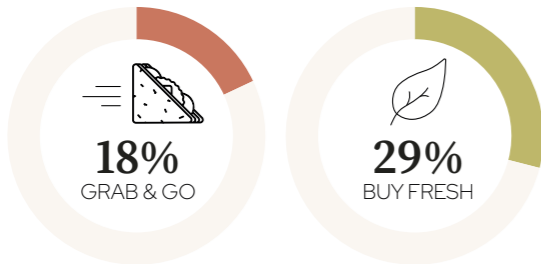
The midday–3pm period remains the most popular time to buy a sandwich, but consumers are increasingly spreading sandwich consumption across the day. **Two-thirds (67%) buy sandwiches as a snack between meals – a behaviour especially common among men (73%), under-34s (79%), Londoners (87%), Scots (78%) and those with children (74%).** By contrast, consumers in Yorkshire & Humber are not as likely to buy sandwiches as a snack (48%). This reflects shifting snack culture and the growing role of sandwiches as flexible, fill-the-gap fuel.



Sandwiches are also making inroads into dinner. **Sixty-two percent of consumers say they sometimes eat a sandwich for their evening meal, with this trend strongest among under-34s (68%) and Londoners (79%),** and less prevalent in Yorkshire & Humber (43%). Families once again over-index, **with 67% of those with children relying on sandwiches for a convenient dinner solution.**

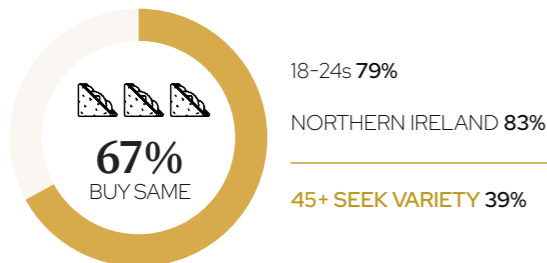


Format preferences...



When it comes to format preferences, **only 18% prefer grab-and-go sandwiches outright**. Nearly a third (29%) prefer freshly made options, while **the majority (53%) say it depends on where they are buying, how quickly they need it, or the price**. Those aged 45–54 are most likely to prefer grab-and-go (23%), those aged 55+ are most likely to weigh their choice by outlet (28%), and 25–34s are the most driven by speed (30%).

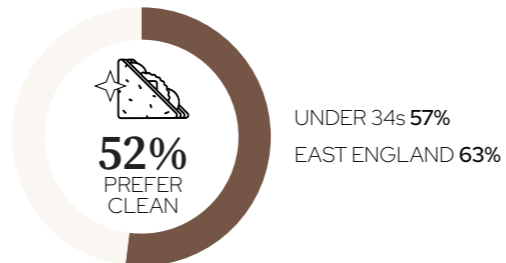
Sticking to their favourite sandwich...



Despite the appetite for novelty, **two-thirds of consumers (67%) typically buy the same sandwich every time, with half of them saying they stick to a favourite**. Young adults lead this behaviour, with 79% of 18–24s usually choosing the same sandwich, reflecting a preference for consistency and routine. **Northern Ireland stands out, with 83% buying the same sandwich**, often motivated by avoiding the risk of not liking something new. In contrast, **consumers aged 45+ are the most likely to seek variety (39%)**, showing stronger interest in trying different sandwiches. Consumers without children are also less likely to stick to a single favourite.



Clean vs ooey-gooley!



Ease of eating plays a major role in what people choose. Over half (52%) **prefer a sandwich that is easy and clean to eat**, while 35% don't mind a bit of mess if the pay-off is good, and 13% love an ooey-gooley, spill-risking sandwich. Under-34s are the most mess-averse (57% prefer clean), while the Northeast stands out for its love of ooey-gooley sandwiches (21%). East Midlanders are the most willing to embrace mess if it's worth it (51%), whereas consumers in the East of England are the firmest on avoiding it (63% prefer clean; only 9% love ooey-gooley).

Baguettes remain the top out-of-home choice for both breakfast and lunch, particularly among older consumers. Younger consumers, however, are leaning more toward flatbreads including wraps and pittas, showing how format preferences diversify with age.



"The UK sandwich market is evolving fast. Quality is rising, dayparts are expanding, and consumers are mixing routine with discovery. It's a market defined by both comfort and exploration and that's exactly why it's thriving."



TOP 10 CONSIDERATIONS WHEN BUYING A SANDWICH

34% TASTY

33% QUALITY

32% FRESHNESS

25% FILLING

25% HEALTH

23% VALUE

22% FORMAT OF CARRIER

17% GREAT VISUAL

16% BIG OR FILLING

13% IN A MEAL DEAL



WHAT DOES 'TASTY' MEAN TO CONSUMERS?

63% FRESHLY MADE

60% FILLING INGREDIENTS

52% VARIETY OF FILLINGS

39% TYPE OF DOUGH OF CARRIER

38% FORMAT OF CARRIER

26% SERVE TEMPERATURE

24% CUISINE INSPIRATION



THE KEY TRENDS DRIVING SANDWICH PURCHASE AND CONSUMPTION

TREND #1: TASTE & FLAVOUR

In the world of the sandwich, taste is a deal-maker. **Over a third of consumers (34%) say tastiness is the single biggest reason they choose one sandwich over another** – and freshness plays a huge role in delivering that experience. **Nearly two-thirds of consumers (63%) associate freshly made sandwiches with great taste**, reinforcing the value of simple preparation cues such as visible assembly, crisp salad, and great menu descriptors – all good ways to signal quality before the first bite.

The reasons consumers choose one sandwich over another...



CHEF TIPS

“A classic chicken salad can taste entirely different on a tangy sourdough, a buttery brioche, or a seeded baguette. Changing the carrier is one of the easiest ways to elevate a familiar favourite.”



GETTING THE CLASSICS RIGHT

Despite an appetite for innovation, the foundation of a great sandwich still lies in perfecting the classics.

The core filling, the balance of flavours, and the sense of abundance are all major contributors to perceived tastiness. **With 39% of consumers saying the dough of the carrier influences how tasty a sandwich is**, café operators should treat the bread as part of the flavour profile, not just the vehicle for a filling.

Cuisine inspiration also matters: **one in four consumers (24%) say it shapes how tasty a sandwich feels to them**. But it’s important to remember that, when in doubt, people default to comfort. **Brits’ go-to cuisines remain British (70%), American (45%) and Italian (34%)**. This creates a sweet spot for operators: menus don’t need a full global overhaul, just subtle, thoughtful twists on what customers already love.



CHEF TIPS

Adding newness without rewriting the menu

“Introducing ‘new’ doesn’t have to mean reinventing your lineup each season. Smart operators layer innovation onto a reliable base. For example, rotating limited-edition versions of a top-seller, such as a Caprese with a seasonal pesto, or a BLT with a smoky glaze, adds excitement without menu sprawl. Innovation is less about complexity and more about discovery. Small changes can create a big sense of freshness without adding new processes or an excessive number of extra ingredients.”



CONDIMENTS: THE EASIEST ROUTE TO FLAVOUR IMPACT

Heat is hot when it comes to sandwich condiments, with four of the top ten condiments consumers want in their sandwiches delivering some spice. This opens an accessible pathway to modernise classics without alienating cautious customers. A gentle chilli mayo, a smoky chipotle, a pepper-infused honey, or a mild 'nduja spread can introduce warmth without overpowering familiar profiles.



"For operators wary of going too far, condiments serve as a low-risk testing ground. They're affordable, easy to trial, and quick to dial up or down. Pair them with tried-and-trusted cuisines and carriers, and customers gain the sense of flavour exploration while staying within their comfort zone."



EGG MAYONNAISE SANDWICH

Serves 1 | Prep: 15 mins

Ingredients:

- 2 slices white bloomer
- 2 eggs
- 1 tbsp mayonnaise
- 1 tsp mustard
- A small amount of milk (optional)
- ½ green onion (finely chopped)
- Salt and pepper to taste

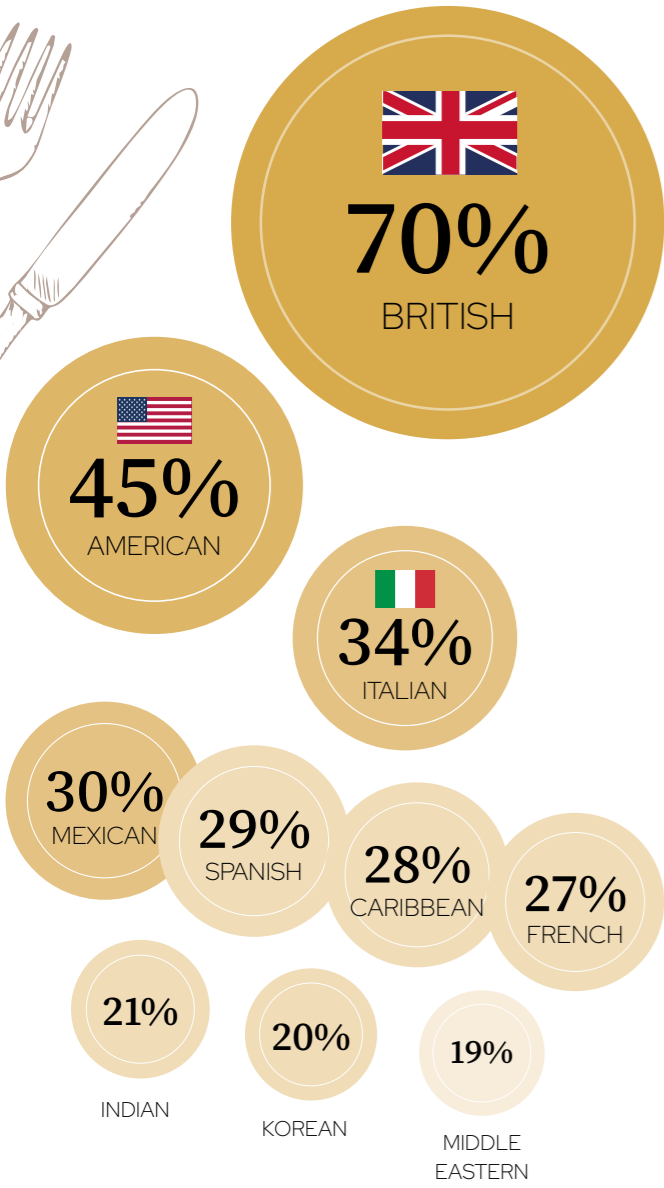
Preparation:

- Boil two eggs (one for 6 minutes, the other for 10 minutes) and cool in iced water.
- Combine the 10-minute egg yolk with mayonnaise and mustard, then fold in the chopped egg whites, add milk (if using, for a creamier consistency), seasoning, and green onions.
- Lightly toast the bread and spread with the egg mixture.
- Halve the 6-minute egg and place between the slices.
- Chill for 2 hours before serving.



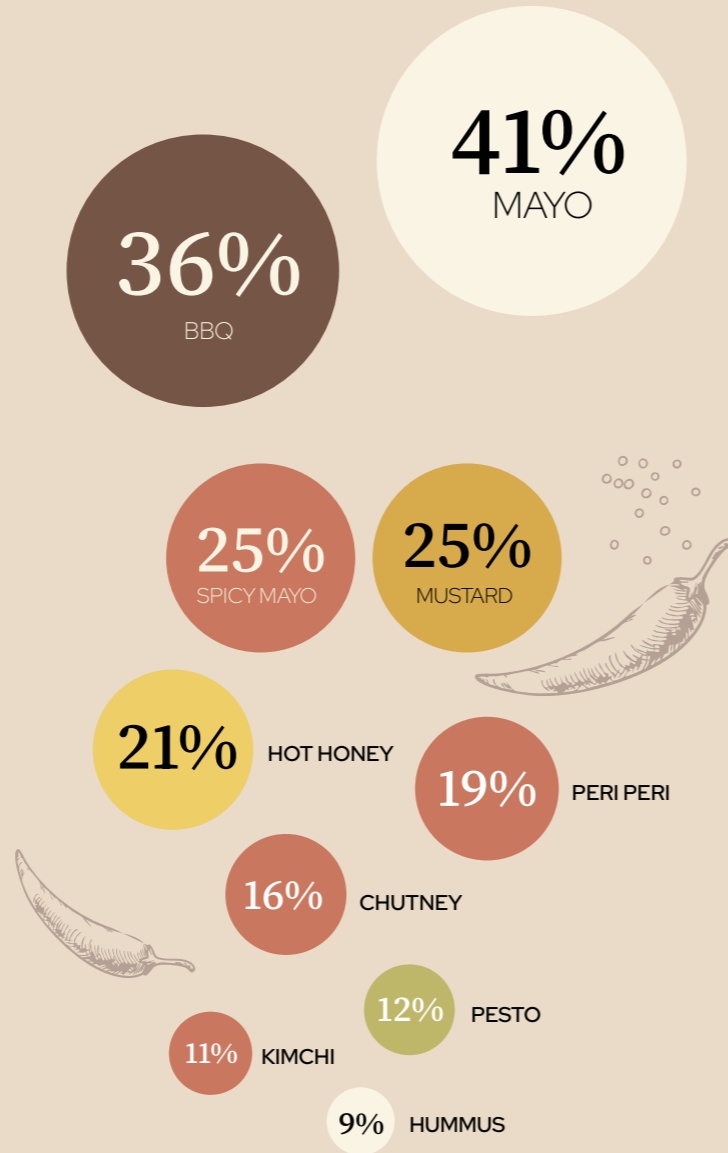
"Switch the mayonnaise for a spicy mayonnaise - or add another condiment such as kimchi to make it 'world/fusion'."

TOP 10 CUISINES



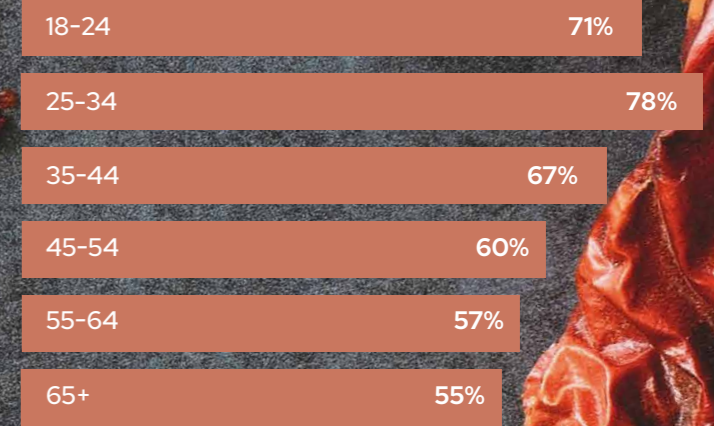
42% of consumers aged 65+ only selected one cuisine, and 28% of consumers aged 18-34 selected 5 or more cuisines.

TOP 10 CONDIMENTS



17% of consumers aged 65+ prefer no condiments.

SPICE VS AGE



SPICY MAYO, HOT HONEY AND PERI-PERI APPEAL PARTICULARLY TO THE FOLLOWING...



TOP SANDWICH FILLINGS - BREAKFAST

NO. 1 Egg, sausage & bacon

NO. 2 Ham & cheese with mayonnaise

NO. 3 Ham, cheese & tomato

NO. 4 Bacon & mushroom

NO. 5 Egg, sausage, bacon & mushroom



TOP SANDWICH FILLINGS - LUNCH

NO. 1 Tuna & cucumber

NO. 2 Cheddar & coleslaw

NO. 3 Egg, sausage & bacon

NO. 4 Chicken & coleslaw

NO. 5 Salmon & cucumber



H&H SAYS



International experimentation

“Fillings no longer need to match their bread format, as consumers increasingly seek out unexpected global flavours in their search for the next new sandwich. This has given rise to inventive hybrids such as the paratha smash cheeseburger, where familiar comfort meets international culinary influence. There is also a growing appetite for bolder flavours and more dynamic textures. Crunch sandwiches, for instance, offer the ideal contrast between a crispy exterior and a juicy interior, capturing the sensory intensity many consumers now look for. Gen Z in particular gravitates towards hot and spicy condiments, with favourites such as hot honey, kimchi and savoury-sweet butters adding excitement and heat.

“At the same time, global sandwich shops are opening or expanding in London, raising consumer expectations for authenticity. Italian All’Antico Vineaio brings Florentine schiacciata stuffed with Italian deli meats, Texan-born Which Wich Superior Sandwich specialises in customisable toasted sandwiches, and New York-style Jersey Mike’s Subs introduces a distinctly American approach.

“This enthusiasm for international sandwiches shows no sign of slowing, with further global iterations expected to gain traction, such as the Taiwanese breakfast sandwich, the Spanish Bikini, and the Italian trapizzino. While current trends lean towards “more is more” viral twists and boundary-pushing innovation, a countertrend is also emerging: a renewed appreciation for nostalgic favourites.”

BANH MI

Serves 4 | Prep: 15 mins

Ingredients:

- 2 half baguettes
- 400g chicken breast, diced or sliced
- 2 cloves garlic, chopped
- 4 tbsp sesame oil
- 300g shredded white cabbage and carrots
- ¾ cucumber
- 5g fresh coriander
- 100g mayonnaise
- 1 tbsp sweet chilli sauce
- 2 tbsp honey
- 115ml white wine vinegar (or rice vinegar)
- 4 tbsp sugar
- Salt & pepper to taste

Preparation:

- In a large bowl, mix chopped garlic, honey, and add sesame oil and 4 tbsp white wine vinegar. Add salt and pepper. Add diced chicken and coat well. Bake the marinated chicken for 10-12 minutes. Meanwhile, bake the half-baguettes until golden.
- Combine shredded cabbage and carrots in a large bowl. Add the following ingredients and bring to the boil: remaining white wine vinegar, 300ml water, sugar, and a pinch of salt then pour over the vegetables and refrigerate briefly. Cut cucumber into thin sticks.
- For the dressing, mix mayonnaise with chilli sauce. Shred the baked chicken and mix with its juices. Drain pickled vegetables, combine with the cucumber sticks and other veggies.
- Slice baguettes horizontally, spread chilli mayo, add shredded chicken, top with pickled vegetables and coriander. Serve.



TREND #2: QUALITY & VALUE

Quality is the second biggest reason consumers choose one sandwich over another (33%), reinforcing that while taste is important, customers want reassurance that what they're buying is genuinely worth it.

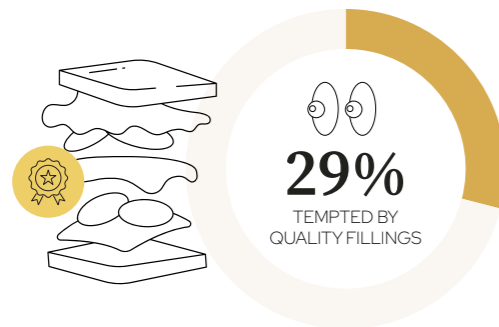
QUALITY AS A DRIVER OF DEMAND

Better quality in the market is the number one reason consumers say they're eating more sandwiches (46%). This highlights a powerful opportunity: when operators raise standards, customers respond. From well-prepared ingredients to thoughtful assembly, quality is a demand driver.

And importantly, quality encourages experimentation. Nearly a third of consumers (29%) say quality fillings could tempt them to step outside their usual choice.

This means that investing in quality breads, more premium proteins, artisanal cheeses, or vibrant vegetables can nudge customers toward higher-margin or lesser-known options without needing to overhaul menu strategy. Whether that means a local producer or a specialist ingredient, highlighting the quality factor on the menu will help consumers understand the added value.

Consumers stepping outside their usual choice...



STEPHANIE SAYS

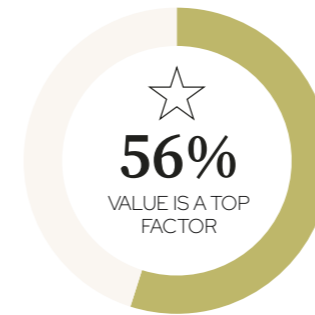


"In times of economic pressure, people become more selective. They won't always set out to spend less; they'll spend smarter."

THE NEW MEANING OF VALUE

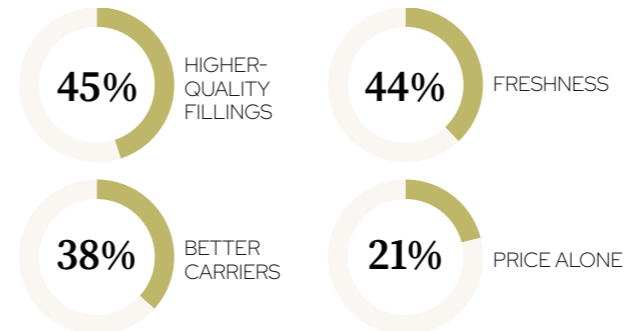
Value for money remains a key pressure point. Over half of consumers (56%) say it's one of the most important factors when choosing where to buy a sandwich. Yet the meaning of "value" has shifted. While 23% list value as a top consideration, drilling deeper shows that the decision is far more nuanced than simply looking for the cheapest option.

Consumers now prioritise the value equation, weighing aspects such as higher-quality fillings (45%), better carriers (38%), and freshness (44%) far above low price alone (21%).



...when choosing where to buy a sandwich

But what is considered value...



STEPHANIE SAYS



"Value today is about feeling that every element earns its place. Customers are chasing the best return on their spend."

CHEF TIPS



"For operators, this suggests a move away from discounting and towards strengthening ingredients, upgrading breads, and ensuring that freshness is consistently delivered and clearly signposted."



39%

Poor value for money is the main reason we're eating fewer sandwiches



13%

Prioritise meal deals

THE RISK OF POOR VALUE PERCEPTION

Poor value for money is a direct barrier to consumption, with 39% citing it as one of the main reasons they're eating fewer sandwiches. This underlines the importance of aligning quality with price perception. A premium sandwich must feel premium – through generous fillings, excellent carriers, and visible freshness. Without this, even a competitive price risks feeling like poor value.



DEAL WITH MEAL DEALS

Only 13% of consumers currently prioritise meal deals when choosing a sandwich, showing that bundling alone isn't a cure-all for value concerns. Meal deals may still play a supporting role, but the modern consumer is clearly more interested in the integrity of the sandwich itself.



H&H SAYS



"The cost-of-living crisis, flavour trends and shifting post-Covid behaviours have been three of the biggest forces shaping today's sandwich landscape. As consumers continue to cut back on discretionary spending and eat out less often, premium sandwiches have become an unexpected gateway to affordable indulgence. They offer the satisfaction of an "eating-out" experience at a fraction of the price of a traditional restaurant meal.

"With more people working from home and out-of-home dining occasions yet to return to pre-pandemic levels, both supermarkets and hospitality operators are capitalising on

sandwiches as a fresh opportunity. The sandwich has become a flexible, accessible solution for a workforce whose daily routines are more varied and fragmented than ever.

"A sandwich can sit anywhere from £1 to £12 depending on the outlet, giving the category a unique "budget-to-premium" span. Even at the top end, premium sandwiches still benefit from a "budget halo": compared to restaurant dining, they feel relatively affordable. This can create a psychological spend ceiling – "I'm not spending £12 on a sandwich" – but it can just as easily make a gourmet sandwich appear like a bargain, depending on the consumer's mindset."

Size matters

"The current 'delimaxxing' sandwich trend will continue, with excessive sandwiches bulging with deli meats, cheese and condiments, but we also predict a return to simplicity and restraint as the counter trend. Think jambon beurre or cheese and pickle, where the focus is on single ingredients sourced excessively well."



JAMBON BEURRE BAGUETTE SERVES 2 | PREP: 5 MINS

Ingredients:

- 1 sourdough baguette
- 2 knobs butter
- 2 or 3 slices ham
- 2 or 3 cornichons sliced lengthwise

Preparation:

- Cut the baguette horizontally, spread one knob of butter inside each half baguette.
- Place the slices of ham on the bottom half of the baguette and lay the sliced pickles on top of the ham and close the sandwich.
- Serve immediately or wrap the sandwich in parchment paper for on-the-go convenience.



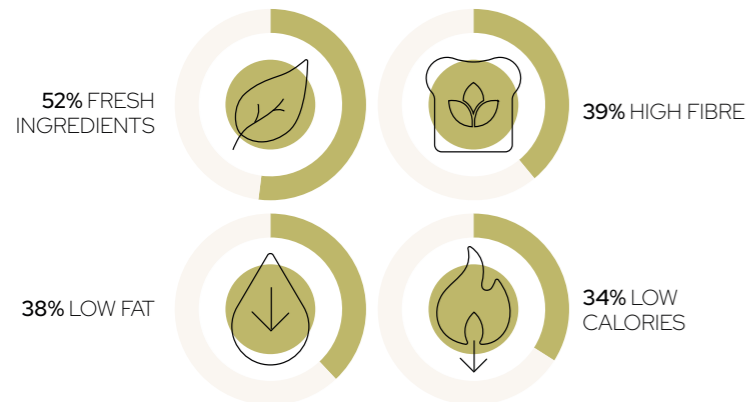
TREND #3: HEALTH

Health continues to influence sandwich choices, with one in five consumers actively prioritising health when selecting what to buy.

There is also clear potential for health-led innovation, as **30% say that healthier options would encourage them to try a different sandwich from their usual**. This demonstrates that wellbeing cues can be both reassuring and drive trial to broaden repertoire.

In terms of what “healthy” looks like, consumers are focused on tangible nutritional signals. **The top benefits they seek include fresh ingredients (52%), high fibre (39%), low fat (38%), and low calories (34%)**. For operators, these are straightforward levers: upgrading salad quality, adding wholegrain or seeded breads, and balancing fillings to reduce heaviness without sacrificing flavour.

Top health benefits sought after...



H&H SAYS



“Health continues to shape the sandwich category, but in increasingly nuanced ways. The strongest health cues remain lower fat, low salt, and high fibre and protein, yet the landscape is shifting. In line with wider wellness trends, we expect fibre to overtake protein as a leading health claim – this is particularly relevant to sandwiches, where naturally high-fibre breads can deliver meaningful benefits without major format changes.

“The rise of consumers taking GLP-1 drugs will also influence demand, as these shoppers look for lighter, appetite-friendly formats and more delicate carriers. This is already driving innovation beyond traditional bread, with brands experimenting in new territory.

“However, the category is being pulled in two opposing directions. For everyday lunch occasions, established health behaviours dominate: consumers look for protein-rich, lower-fat, plant-based, and generally “better-for-you” swaps. But in indulgence-led or experience-driven out-of-home moments, health becomes secondary. Here, shoppers gravitate toward “more is more” formats – overfilled deli sandwiches, flavour-maxed combinations, and unapologetically high-fat ingredients.”



“Protein-rich fillings, vibrant vegetables, and nutrient-dense breads can help a sandwich feel both nourishing and satisfying.”



1 in 5
LOOK FOR ENERGY BOOST

30%
LOOK FOR SOMETHING FILLING

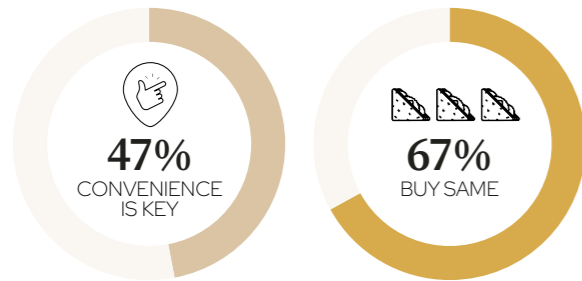
Energy and satiety also play a role. One in five shoppers want a sandwich that gives them an energy boost, while **30% look for something filling enough to prevent snacking before the next meal**.

Crucially, health doesn’t replace indulgence; it sits alongside it. Consumers still expect comforting, flavour-forward options – just with the choice to go lighter when it suits their day. The winning strategy is a menu that offers both balance and pleasure.



TREND #4: CONVENIENCE

Sandwiches by their very nature lend themselves to the convenience trend – and **47% of consumers say that where they choose to buy their sandwich is driven primarily by ease and accessibility.**



Habit plays a major role in this behaviour. **Two-thirds (67%) of consumers typically buy the same sandwich most of the time**, highlighting how strongly routine anchors choices. This loyalty to familiar favourites creates both stability and opportunity: operators can keep core bestsellers front and centre while introducing subtle seasonal or limited-edition variations to gently broaden repertoire.



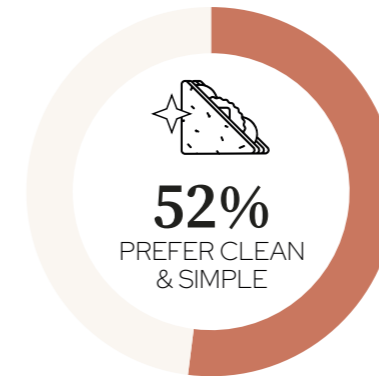
STÉPHANIE SAYS



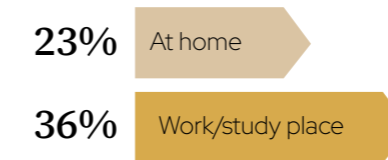
“Convenience today is about more than speed. It’s about offering quality and health without slowing people down.”

Ease of eating is another important dimension of convenience. **Half of consumers (52%) prefer a sandwich that is clean and simple to eat**, proof that practicality is an important consideration. **With 36% eating their sandwich at their workplace or place of study**, the format’s reputation as the “ultimate desk food” still holds true. **Another 23% take their sandwiches home**, showing that portability and reliability continue to underpin the category.

Ease of eating is important...



Where sandwiches are eaten...



Interestingly, despite the prominence of convenience, only one in five consumers **(18%) actively prefer a grab-and-go sandwich**. This suggests that while speed matters, consumers don’t want to feel like they’re compromising on quality or freshness.

only
18%
PREFER
GRAB AND GO



STÉPHANIE SAYS



“Modern convenience is elevated convenience: fresh, tasty, healthy, and made to fit real life. For operators, the opportunity lies in aligning speed with satisfaction: making high-quality, fresh, easy-to-eat sandwiches available in the most frictionless way possible.”



H&H SAYS



“Convenience is evolving far beyond speed, and the sandwich category is adapting quickly to meet the needs of increasingly time-pressed consumers.”

“It’s now about smarter systems, elevated experiences and delivering quality wherever the consumer happens to be.”

TREND #5: SOCIAL MEDIA



From hot flavours and cheese pull reels to destination content creation, **social media is a mecca for sandwich discovery.**

Indulgent sandwiches, that both look and taste incredible, play into the Gen Z trend for treating. When owning a house seems out of reach, this generation is willing to spend on treats, including the latest hot place for viennoiserie, artisan sourdoughs or killer sandwiches. Favourites include **Manchester's Fat Pat's**, with its moreish **Philly Cheesesteak** and **Shrimp Po'Boy** offerings; and **Derek's in Liverpool**, which touts indulgent **NY-style sandwiches** such as the **Holiday Hoagie** and **Rubenstein**. These decadent sandwich spots have amassed tens of thousands of Instagram followers – dropping limited edition sandwich content, beautiful cross-section images and even merch.

H&H SAYS



"A phenomenon now emerging is 'sandwich tourism', reminiscent of the queues for independent bakeries, where consumers travel to experience a city's renowned sandwich shop. Excessive sandwiches have become a nationwide trend, with standout locations including Alfonso's Deli in Leeds, Jaw's in Bristol, and Piece in Glasgow, and Crunch, Dom's Subs, Max's Sandwiches, Secret Sandwich Shop, and Rogue Sarnies in London. This trend is further fuelled by YouTube channels such as Food with Chetna and Owen Han: Stacked, which showcase these indulgent creations and amplify their cult appeal."

BITE OCCASIONS

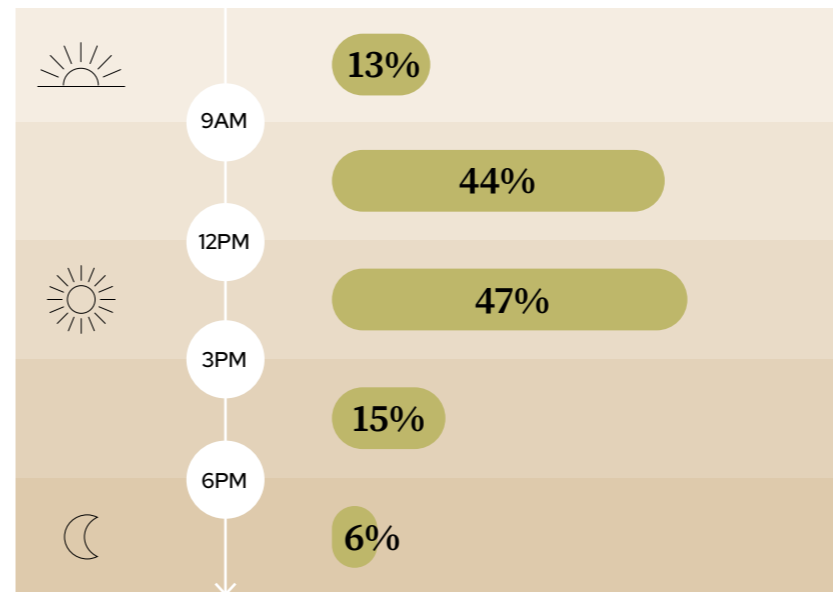
WHEN, WHERE & WHY



"Consumer purchasing and consumption behaviour clearly reflects the rhythms and pressures of modern daily life. Early-morning purchases are likely driven by commuters who either skip breakfast or need something portable, with younger adults most likely to grab-and-go and eat immediately. The peak between midday and 3pm highlights the traditional lunch window, as consumers look for the ideal blend of both convenience and routine."

"The steady rise in delayed eating, whether buying at lunchtime but eating at 3–6pm, or purchasing late afternoon and saving it for later, signals increasingly fragmented meal patterns. Time pressure, shifting work schedules and desk-based lifestyles mean many consumers can source food but struggle to stop and eat it. Ultimately, sandwiches don't need to be eaten straight away and hold well for enough time to function as flexible fuel for increasingly busy days."

WHEN PEOPLE BUY SANDWICHES





Buying before 9am

Around **13% of consumers purchase sandwiches before 9am**, with the **highest likelihood among those aged 18–34 (17%)**. Over a third (**37%**) eat their sandwich immediately, with impulse particularly important for those aged 18–24, while **42% eat between 9am and midday**, and around **one in five delay eating until midday–3pm**.

Buying between 9am and midday

This period accounts for **44% of sandwich purchases**, making it a major buying window, **especially for those aged 65+ (55%)**. Most buyers in this window (**63%**) eat their sandwich **before midday** in order to consume it at its freshest, while about one-third (**34%**) save their sandwich for midday–3pm.



Buying midday–3pm

Midday–3pm is the most popular time for buying sandwiches. **Purchases are especially common among 18–34s (54%) and 45–54s (53%)**.

Once bought, most consumers (**61%**) eat their sandwich **between 1pm and 3pm**. Around one in five consumers eat immediately, between midday and 1pm, while another one in five hold on to their sandwich until 3–6pm, suggesting busy schedules that delay eating even after securing food.

Buying 3pm–6pm

About **15% of consumers buy sandwiches during this late-afternoon period**. Most (**74%**) eat their purchase **within the same timeframe**, but one in four delay eating until after 6pm, making it a substitute for an early dinner.



Buying after 6pm

Only **6% of consumers buy sandwiches after 6pm**. Of these, most (four in five) eat their sandwich before 8pm, while one in five eat later in the evening, after 8pm, suggesting sandwiches serve as a convenient late-evening meal for a small but notable group.



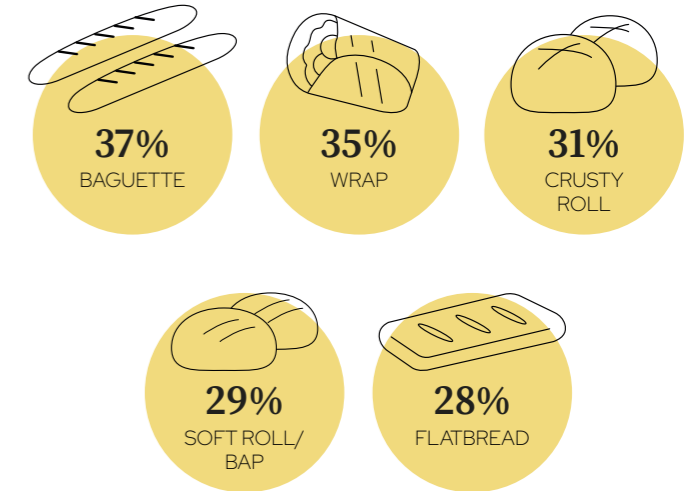
“Larger-format sandwiches are increasingly suited to supper and evening meal occasions, and brands are capitalising on this by offering specials, and the option to add sauces and sides, as seen with examples like Fat Pat’s Ziggy Fries and Sauce Montréal.

“Sandwiches are now firmly positioned as an all-day food. This makes breakfast, dinner, and mini-meal sandwich formats feel more inventive, giving consumers a break from the norm and tapping into that nostalgic “cereal for dinner” sense of playful comfort. At the same time, lighter and smaller bread formats are helping sandwiches move into the at-home snacking space, with innovations such as bagel, flatbread and focaccia thins enabling more casual, bite-sized consumption.

“Sandwiches are also branching into sweet territory, acting as an alternative to a dessert or slice of cake. Innovations from M&S, Tesco and Aldi highlight this growing opportunity, with Japanese-inspired sandos such as strawberries and cream, birthday cake and cake-based flavours blending two familiar elements into a playful hybrid.”

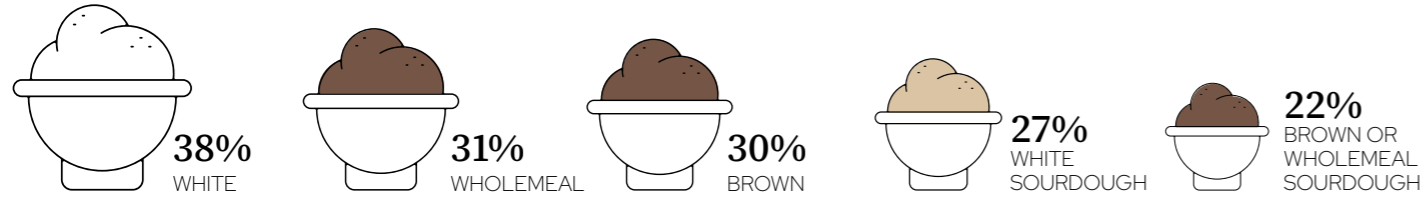
KEY CARRIERS BY OCCASION - BREAKFAST

Top 5 carriers:



KEY CARRIERS BY OCCASION - BREAKFAST

Top dough:

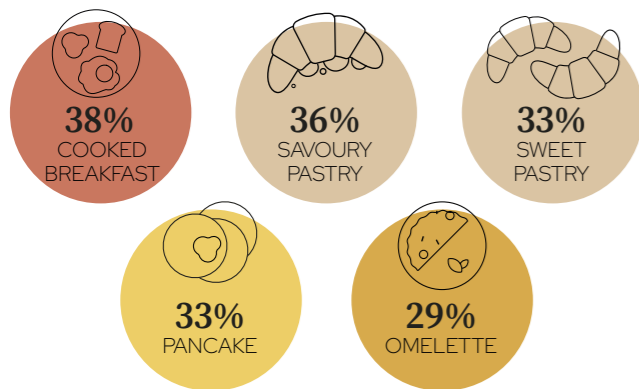


Preferred serves:



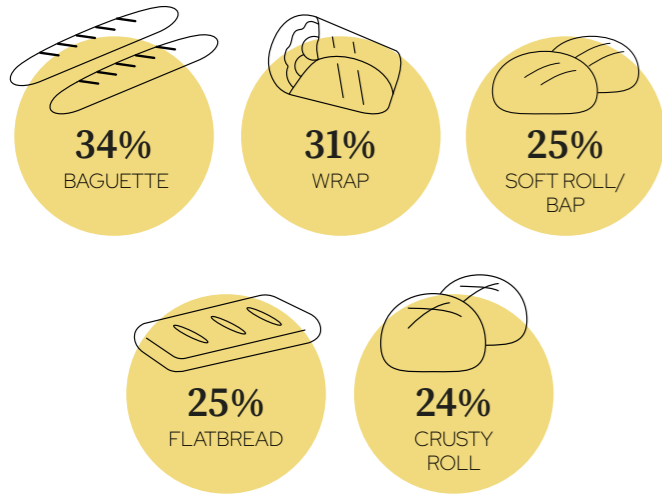
Top sandwich alternatives:

4% would only consider a sandwich for an OOH breakfast



KEY CARRIERS BY OCCASION - LUNCH

Top 5 carriers:



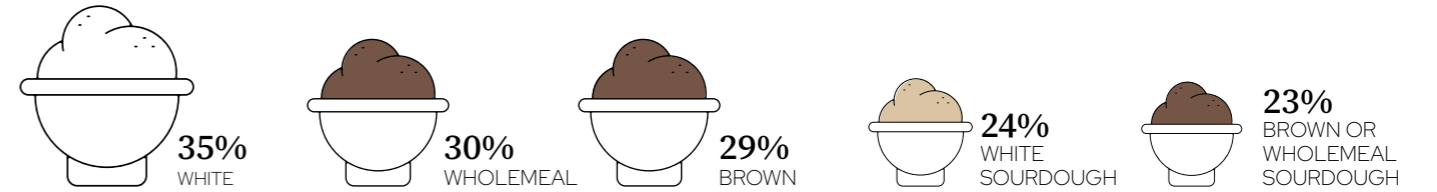
Overall, **Italian-style carriers account for 42%**, including panini, ciabatta and focaccia.



KEY CARRIERS BY OCCASION - LUNCH

Top dough:

83% opt for healthier options including wholemeal, seeded, malted or granary

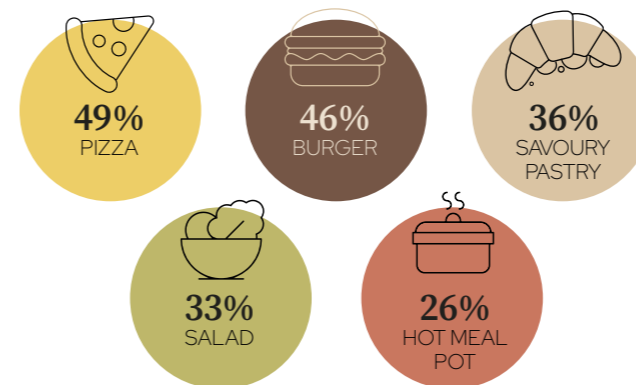


Preferred serves:



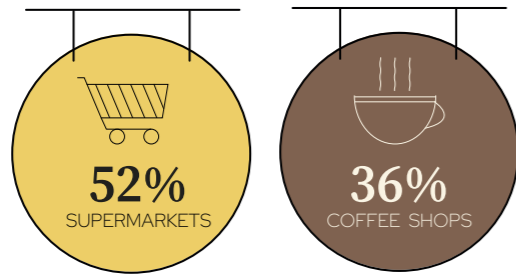
Top sandwich alternatives:

6% would only consider a sandwich for an OOH lunch



WHERE & WHY

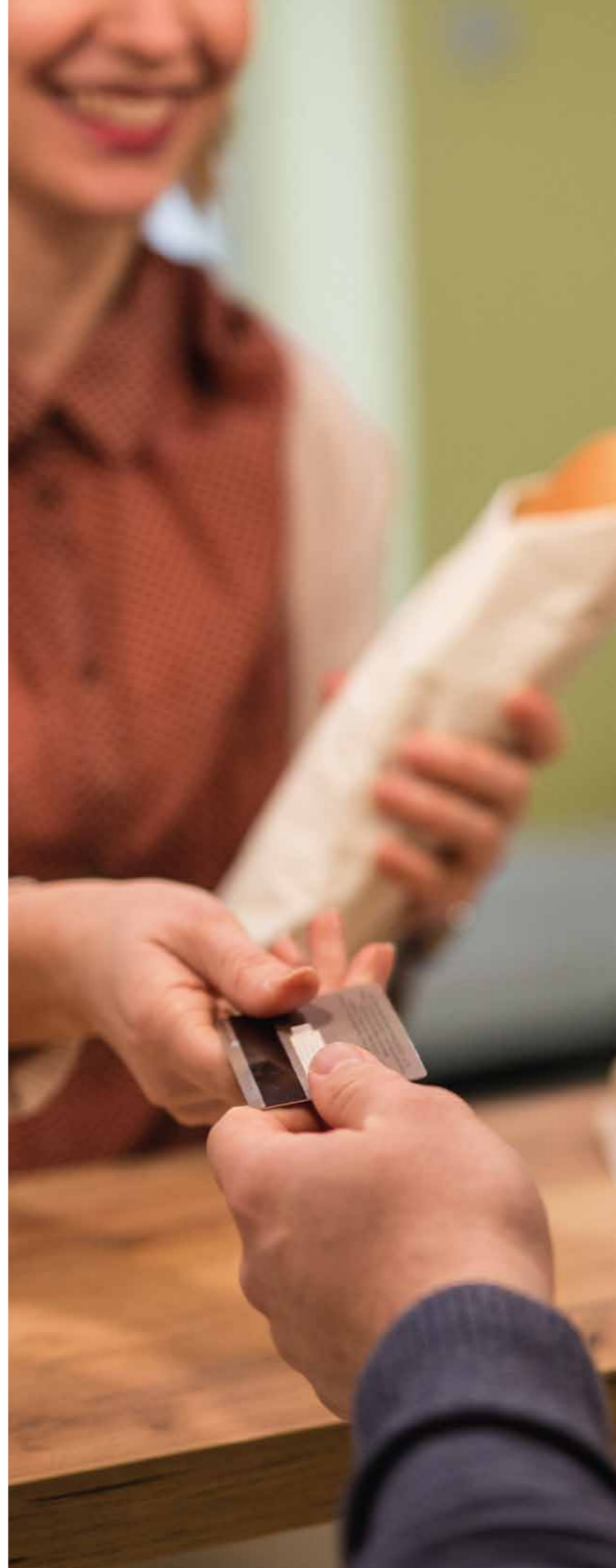
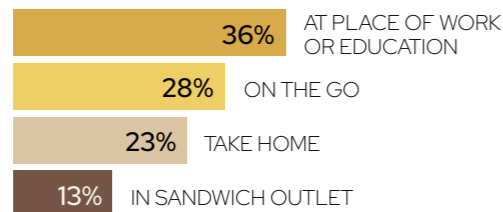
Key destinations where consumers buy their sandwiches...



Most consumers keep their sandwich purchasing relatively focused, with two-thirds buying from three or fewer types of outlets over a three-month period. This shows that sandwich buying is largely habitual, shaped by convenience, routine and trusted locations. **Supermarkets remain the most popular place to buy sandwiches, with 52% of consumers choosing them** – influenced heavily by value for money (60%) and choice (30%). **Coffee shops are also a key destination, attracting 36% of buyers who may be seeking a more premium or freshly prepared option**, while 31% turn to food-to-go outlets for speed and efficiency during busy days.

Where consumers eat their sandwiches further highlights why these outlets matter. **Over a third (36%) typically eat their sandwich at their place of work or education**, reinforcing the idea that sandwiches are the ultimate desk-friendly food – easy to transport, quick to eat and mess-free. **A significant 28% eat on-the-go**, suggesting that mobility and minimal interruption to daily routines are major drivers behind sandwich purchases.

Where consumers eat their sandwiches...



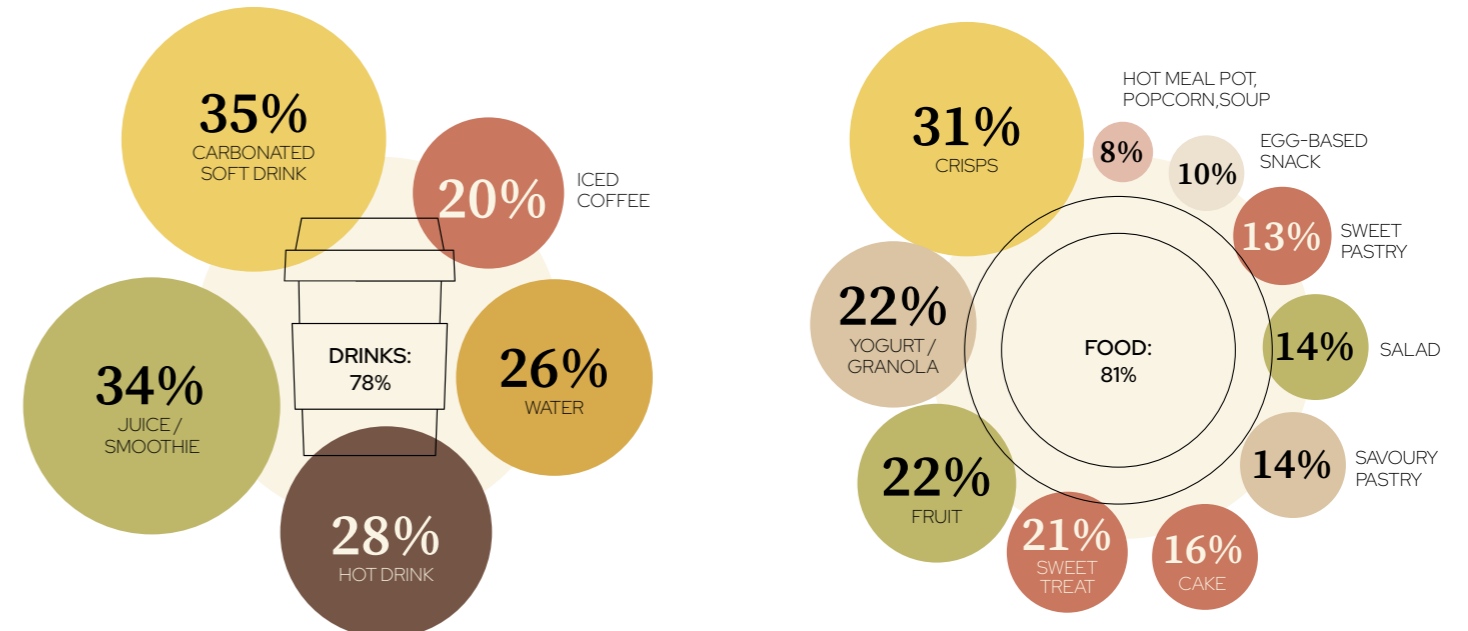
Meanwhile, **23% of consumers take their sandwich home**, using it as a convenient meal solution without the need to cook. Digging into the data, we can see these consumers are more likely to be women, child-free, unemployed or retired, home-based or hybrid, those who purchase sandwiches less frequently and those who buy from a supermarket.

Only **13% choose to eat their sandwich in the outlet where they bought it**, indicating that most consumers prioritise speed, portability and flexibility over a dine-in experience. Collectively, these patterns show that people buy sandwiches where it's easiest and eat them wherever their day takes them.



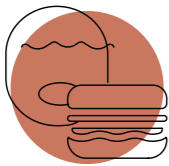
TOP SANDWICH PAIRINGS

3% say they don't buy any other food or drinks when buying a sandwich



37% buy something sweet

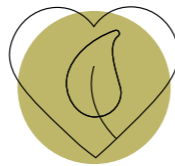
KEY TAKE AWAYS



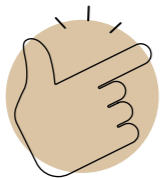
Consumption is rising as quality improves and dayparts expand



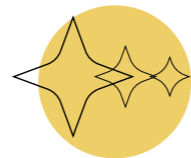
Quality, flavour and freshness drive choice – and premium cues matter



Health sits alongside indulgence, widening the repertoires



Convenience is evolving into 'elevated convenience'



Visual appeal and social media are fuelling a culture of sandwich discovery

TAKE A BITE OUT OF DÉLIFRANCE INSIGHTS



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FINAL WORD



Stéphanie Brillouet

"We hope this report has given you a flavour of the evolving and dynamic world of sandwiches.

"The UK sandwich market is enjoying renewed momentum as consumers embrace sandwiches more frequently, across more moments of the day, and with higher expectations of quality. Improved standards – better ingredients, fresher assembly and more thoughtful flavour profiles – are directly fuelling increased consumption, especially among younger consumers, families and urban buyers. Sandwiches are no longer confined to the classic lunchtime slot; they now span snacking, dinner and flexible in-between eating occasions, supported by shifting routines and more fragmented daily rhythms.

"Taste remains the strongest reason for choosing one sandwich over another, but consumers increasingly equate tastiness with freshness, premium carriers and balanced, generous fillings. Operators that elevate the classics through quality cues, subtle twists and flavour-impacting condiments win both trial and loyalty. Value has also evolved: shoppers aren't simply looking for low prices, but for sandwiches that feel worth the spend, with visible freshness and ingredient quality reassuring them that each element 'earns its place'.

"Health continues to coexist with indulgence. Consumers gravitate toward sandwiches that feel lighter, fresher and more nourishing, yet still expect comfort and flavour when desired. This duality is opening opportunities for fibre-forward breads, protein-rich fillings and vibrant vegetables alongside bold, experience-led formats.

"Convenience remains central but has moved beyond speed. Today's consumers want frictionless access to high-quality sandwiches – pre-orderable, deliverable, portable and easy to eat at desks or on the move. Familiar favourites anchor routine, while limited editions and subtle innovations broaden repertoire without disrupting habits.

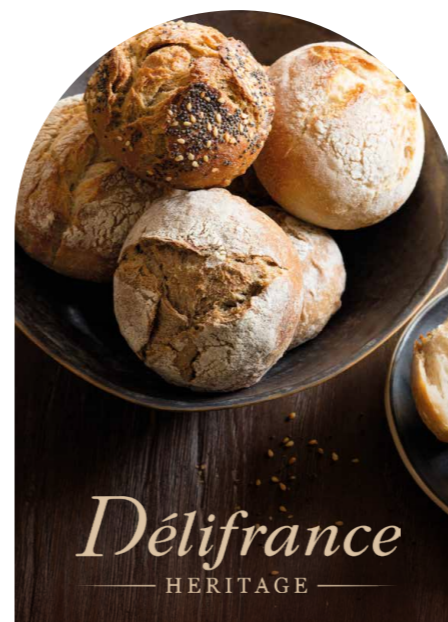
"Finally, social media is reshaping the category's cultural impact. Visually striking sandwiches, overfilled deli styles and globally inspired formats thrive online, driving destination visits and trend-driven experimentation. This visual economy reinforces the sandwich's unique position: simple, versatile, and endlessly reinventable, making it one of the most dynamic and resilient formats in modern food culture."

Stéphanie Brillouet, Marketing & Innovation Director, Délifrance

OUR RANGES

Délifrance brings decades of experience as a leading bakery supplier with a broad range of high-quality sandwich carriers and bread solutions that help operators create on-trend, premium sandwiches.

With its deep French baking heritage and an extensive product portfolio, Délifrance supports foodservice operators and bakers with versatile carriers to suit evolving consumer tastes. Its team of expert chefs works closely with customers on ingredient pairing and recipe development, helping to elevate offerings and drive category-wide innovation.



Exclusive flavour due to high quality ingredients and bakery know-how



Tasty, genuine and honest Délifrance products



A wide range of Italian breads authentically made with traditional processes

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