



Sandwiches **Unwrapped** 2019



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We've crunched the data on 620 sandwiches available from popular lunch time retailers. Find out which of them are supporting us to eat healthier, more sustainable diets.

What we found...

More plant-based options are making their way to the shelves, but still the sheer volume of meat-based sandwiches is a big concern. **85% of sandwiches have meat, fish or cheese as their main ingredient.**

If you're looking to understand where the meat comes from in your sandwich you will struggle. **33% of meat sandwiches contained meat of unknown origin. This includes all of the meat sandwiches at Boots and Subway, and the vast majority at EAT.**

You won't find many options of better meat.
We found only 2 sandwiches carried any better meat certification.

Taking a look at sandwiches

Sandwiches are an iconic staple of the British diet: last year we bought an incredible 4bn ready-made sandwiches, at a cost of £8bn. **76% of consumers buy lunch to eat out of home for an everyday occasion.**

The sandwich market is overwhelmingly meaty, and this is reflected in the range of options we can find on the high street. Eating Better has consistently found that **the vast majority of sandwiches available to buy in the UK high street are meat, fish or cheese.** The British Sandwich and Food to Go Association reports that **chicken is the top filling**, by weight, closely followed by both ham and cheese. **The scale is staggering: each year, 43,000 tonnes of chicken go into ready-made sandwich fillings, that is equivalent to over 69 million chickens.¹**

Sandwiches have a staggering carbon footprint

The **11.5 billion sandwiches we eat each year in the UK** generate, on average, **carbon emissions equivalent to the annual use of 8.6 million cars.** Research on the carbon footprint of UK sandwiches, from the University of Manchester, found that the popular ready-made 'all-day breakfast' sandwich, containing sausage, bacon and egg and available in most stores we surveyed, has one of the highest carbon footprints of all, **a whopping 1441 grams of CO2 eq.** on average, which equates to driving a car for 12 miles. Reducing or avoiding certain sandwich fillings, in particular meat and cheese, can really help make your lunch choices much more environmentally friendly.

“Sandwiches and ready meals make up a significant part of our diet. Only 14% of ready meals and 30% of sandwiches are meat and fish free. Replacing meat with veg is a critical part of our journey to eating better and living longer, but the supermarkets and manufacturers are not yet doing enough to help us make that journey.”

Anna Taylor OBE

Executive Director, The Food Foundation

The Eatwell Guide: less meat and cheese, and more vegetables and pulses for a healthier diet

There is a big gap between a healthy and sustainable diet and what we are actually eating. Compared to the average British diet, **the Eatwell Guide recommends reducing consumption of meat, fish and alternatives by nearly a half.** Looking into the detail, to meet the **Government's nutrient recommendations** we would need to:

- reduce red and processed meat consumption by 80%
- compensate for that reduction and get more protein from vegetarian alternatives such as beans and pulses, increasing our consumption by 86%
- reduce cheese consumption by 85%

Choosing plant-based fillings for your sandwiches can also be better for your health

For most of us, **eating healthier means eating more fruit, vegetables, beans and pulses, and cutting down on meat and cheese.** Convenience is important, so what is available in the ready-made sandwich aisle largely shapes our choices. Retailers have an important role in helping people make healthy and sustainable choices, including shifting to more plant-based eating with less and better meat. 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.

Demand for plant-based food is growing

Recent research suggests demand for plant-based food is growing, as **a mainly plant-based diet with only small amounts of meat is on the rise and could soon become the norm.** Our latest YouGov Survey carried out in April 2019 found that 48% of people in the UK are willing or already committed to cutting down or cutting out meat. Awareness of the negative impacts of meat for the environment has grown, and almost a third of people (29%) see climate change as a key reason to eat less meat. Consumer acceptance of change shouldn't be a problem, our survey showed around half of people had eaten pulses (52%) and nuts (45%) in the last month.²

Meat-free lunch times

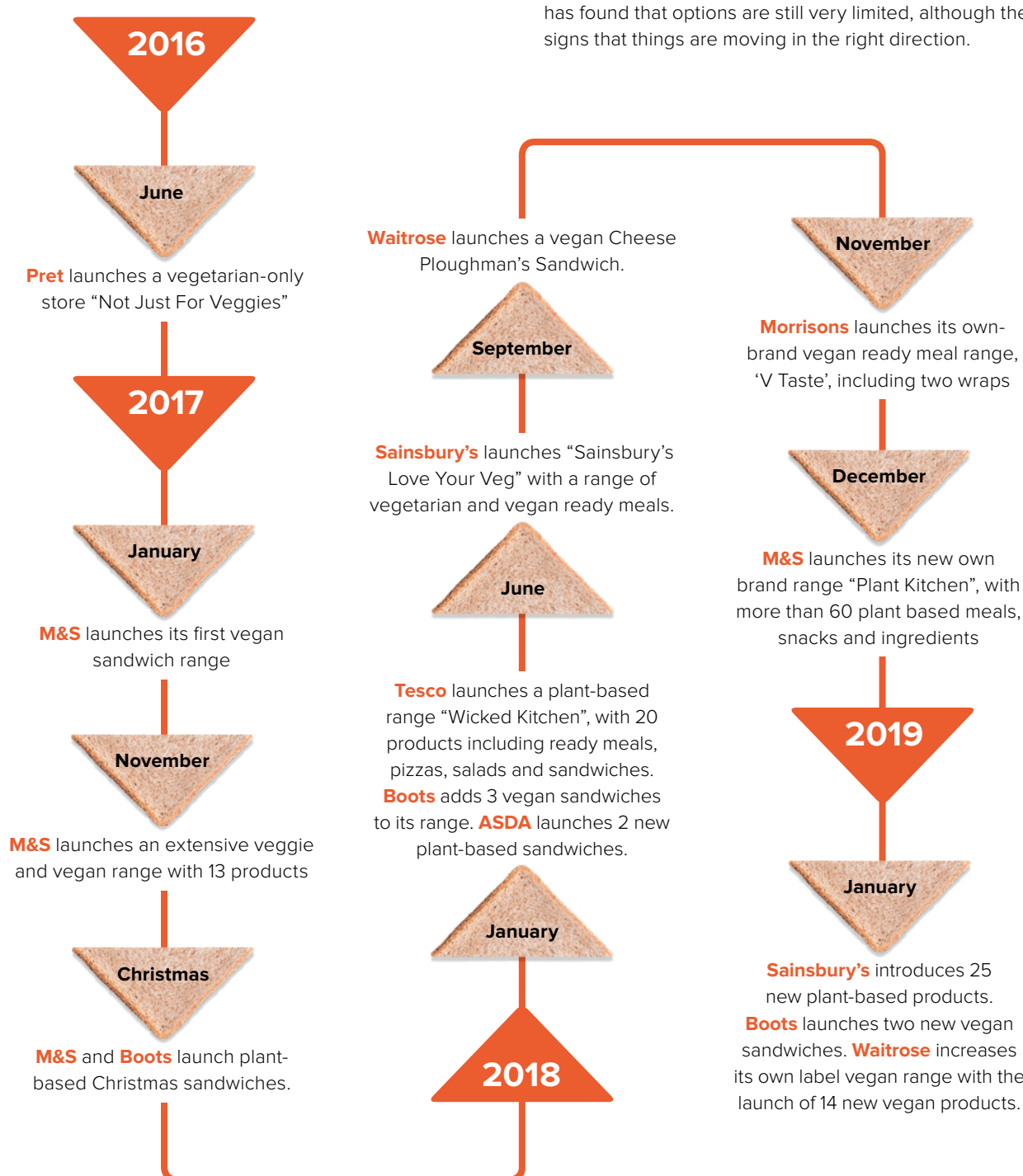
Going meat-free at lunch time can be an easy step for people trying to cut down on meat and increase diversity in their diet. Eating Better encourages people to swap their lunchtime meat, fish or cheese sandwich for a vegetable-based option. This is only feasible if there are enough tasty options available to buy. We encourage all retailers to offer a good selection of tasty sandwiches with less meat, less dairy and more vegetables, nuts and pulses in their place.

2019 Sandwich Survey: has anything changed?

In 2015 and 2016 we looked at the sandwich offering on the high street and found that consumers trying to eat healthily and reduce their impact on the environment would struggle to find a great choice of sandwiches that fit the bill. The vast majority (over 90%) were meat, fish or cheese based, and just two retailers offered enough different meat and dairy free options for every weekday.

Since our last survey 2 years ago, there has been a huge growth of interest in eating more plant-based food, and many retailers have responded with new options. Eating Better wanted to find out whether the focus on flexitarian and plant-based eating has translated into better sandwich options for people looking for a healthy, planet friendly lunch.

Our 2019 snapshot survey of sandwiches from eight supermarkets (Asda, Boots, Co-op, Marks & Spencer, Morrisons, Sainsbury's, Tesco, Waitrose) and four high street sandwich chains (EAT, Greggs, Pret a Manger and Subway) has found that options are still very limited, although there are signs that things are moving in the right direction.



The results...

Our survey included 620 sandwiches, this is what we found:

There is some progress:

Plant-based options are increasing. 57 out of 620 (9%) sandwiches were plant-based, up from 4% in our 2016 survey.

For the first time, you could find a plant-based sandwich in all stores we surveyed.

Two stores have greatly expanded their range. Tesco offers 5 times more plant-based sandwiches now than in 2016, taking their offering from 2 to 10. Pret a Manger now offers 14 plant-based sandwiches, more than anyone else, and they have the least meat in their range.

But still a long way to go:

Plant-based options are still very limited. 6 out of 12 supermarkets offer 3 or less plant-based sandwich options. 85% of sandwiches have meat, fish or cheese as their main ingredient.

Vegetarian sandwiches are dominated by dairy. 49% of all vegetarian sandwiches were cheese-based.

We could find barely any indication of 'better' meat. Out of 357 meat sandwiches, we found only 2 carried any certification to allow people to choose a 'better' meat option.

It's often hard to tell where the meat is coming from. 33% of meat sandwiches contained meat of unknown origin. This includes all of the meat sandwiches at Boots and Subway, and the vast majority at EAT.

Figure 1

Percentage of meat, vegetarian and plant-based sandwich fillings by retailer

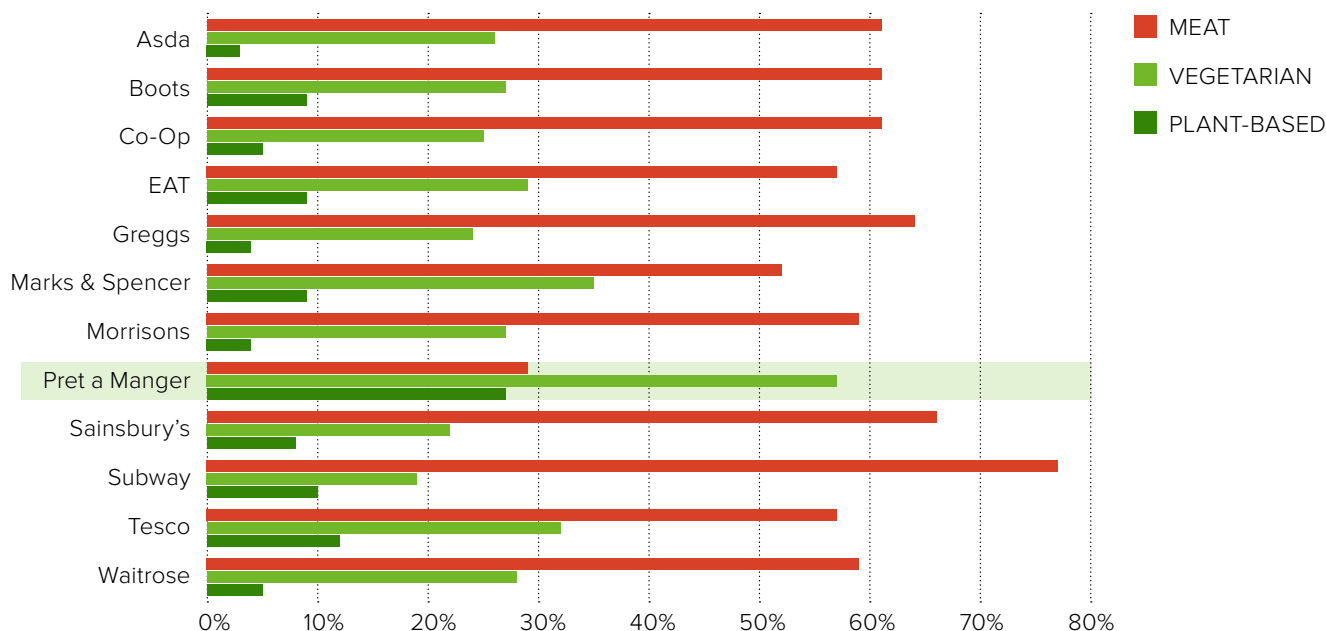
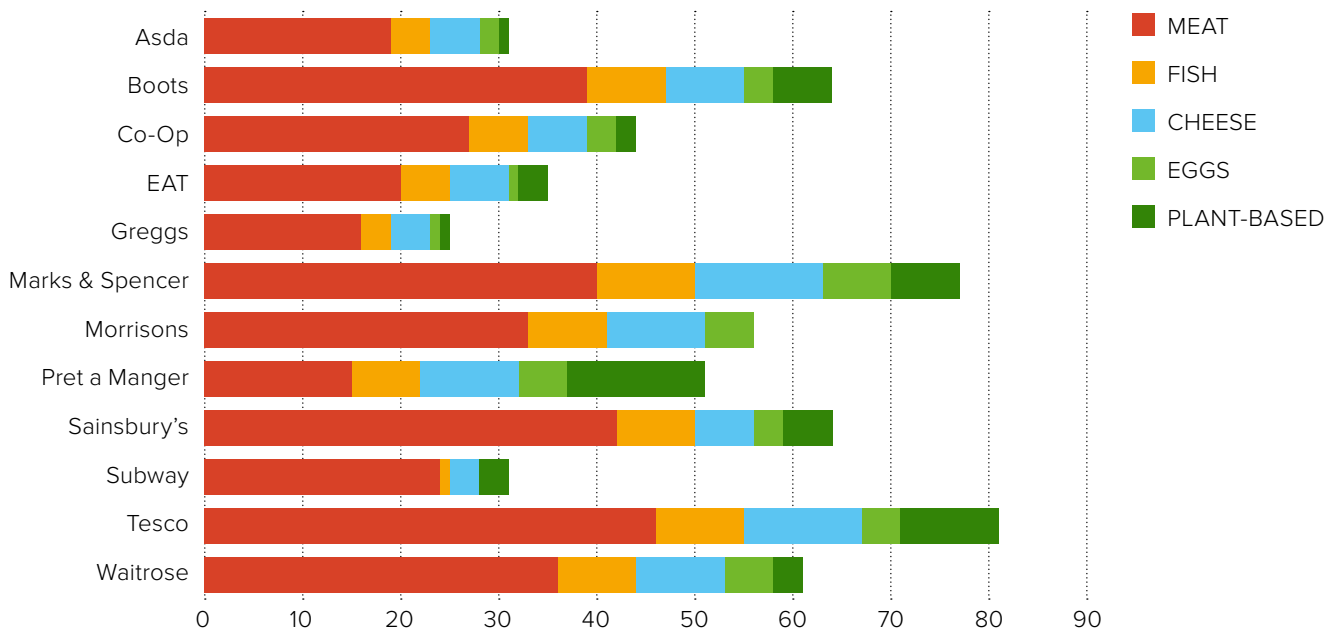


Figure 2
Types and number of sandwiches per retailer



WHAT IS IN THE SANDWICH AISLE?

58% OF SANDWICHES
ARE MEAT BASED

34% OF SANDWICHES HAVE
RED OR PROCESSED MEAT

32% OF SANDWICHES
HAVE CHICKEN

31% OF SANDWICHES
CONTAIN CHEESE

9%

OF SANDWICHES HAVE
PLANTS AS A MAIN
INGREDIENT

HOW RETAILERS ARE DOING

Better options
(MORE THAN 10)

TESCO

PRET A MANGER

Limited options
(MORE THAN 5)

SAINSBURY'S

M&S

BOOTS

Needs
improvement
(LESS THAN 3)

COOPERATIVE

WAITROSE

MORRISONS

EAT

SUBWAY

One token
sandwich

GREGGS

ASDA

NOT ENOUGH PROGRESS

**MOVING
DOWN**

Subway: have doubled their sandwich range, adding 15 new sandwiches, but only included one more plant-based option

EAT: have the same amount of plant-based sandwiches they had two years ago

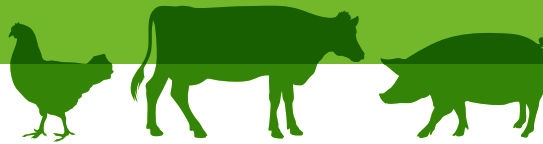
Pret: has a larger plant-based sandwich range than anyone else

Tesco: offers 5 times more plant-based sandwiches now than in 2016

Boots and M&S: now have a different plant-based sandwich every weekday

**MOVING
UP**

DOING BETTER



Origin unknown – where does all this meat come from?

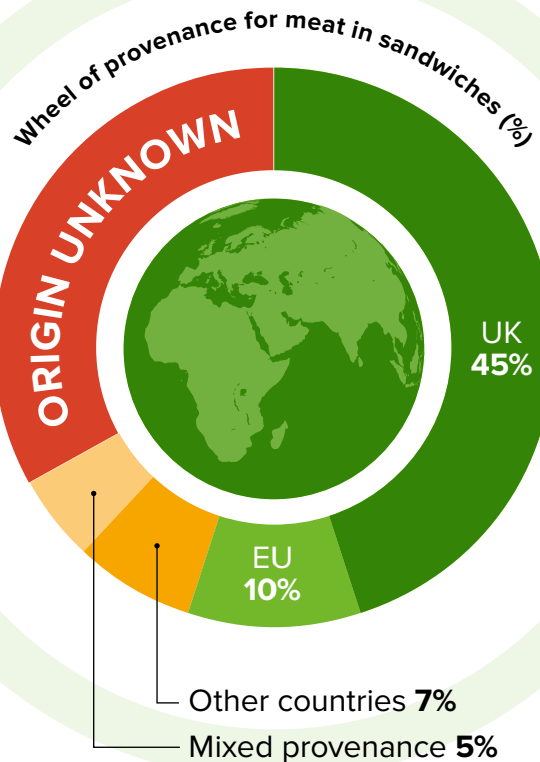
Lack of meat labelling

The Eating Better sandwich survey found 83% of egg sandwiches carried free range certification on the packaging, reflecting consumer demand for better eggs. However, the same concern about animal welfare is not extended to chickens or other animals reared for meat.

We were very disappointed to find that only 2 sandwiches out of 357 carried any 'better meat' certification on the packaging at all, one pork and one chicken sandwich from Sainsbury's premium range carried RSPCA Assured logos.

Where is the meat coming from?

For many sandwiches it is unclear where the meat comes from: one third of sandwiches contain meat of unknown origin. **Yet, some retailers have shown it is possible to provide meat with known provenance: we know 45% of meat in sandwiches comes from the UK.** We could find the origin of the meat for all sandwiches at Asda, Co-op, Morrisons, M&S and Waitrose. Other retailers are lagging behind, with Boots and Subway lacking transparency on where the meat for any of their sandwiches comes from. EAT, Pret and Tesco also have a big proportion of sandwiches containing meat of unknown origin in their offer. This is simply not good enough.



Better meat

At Eating Better we define better meat and dairy as that which comes from animals that are fed a natural diet, have a known provenance and are produced to high animal welfare, environmental and quality standards, with responsible use of antibiotics.

All retailers we surveyed state that they source meat that meets the law on production and welfare, with some choosing assured standard schemes such as Red Tractor Assured and equivalents. A few, such as Greggs and Waitrose, include higher standards in their farm animal welfare policies, but it can be hard to discern what meat is 'better' at the point of sale without a recognisable logo on the packaging.

To choose 'better,' our top suggestion is to look for meat and dairy that meets a certified credible standard – consider organic, free range or RSPCA Assured. This is a difficult task when buying a meat sandwich.

“This survey highlights the need for faster action by retailers. Shops that offer a clear choice of plant-based and high-welfare sandwiches will find that consumers respond, just as they did for clear labelling of eggs of free-range eggs. Surely nobody can argue that it’s good for consumers to be kept in the dark and unable to make informed choices?”

Dr Nick Palmer

Head of Compassion in World Farming UK

What the retailers told us...

Pret have updated their lunch menu with 13 new vegetarian products, including adding one new plant-based sandwich to their range in April 2019.

M&S told us that they have increased their vegan and vegetarian sandwich range from 15 in 2016 to 27 now. They told us *"Plant Kitchen has been a major launch for us and we intend to expand the range further."*

Asda, Boots, Greggs, EAT and Morrisons provided no information when we contacted them.

Sainsbury's told us *"our customers are exploring a flexitarian approach to eating which is why we have invested in this market and now sell over 100 plant-based products."* They also told us they have future plans for expanding their sandwich selection as well as introducing several plant-based lunch options that are not sandwiches.

Subway told us *"we're always looking to introduce new, balanced choices to our menu so as to cater for everyone, whether that's offering more choice for meat-free Mondays or for those following a flexitarian diet."*

Co-Op told us *"we are active in developing more options and in January of 2020 we'll increase our vegan range across sandwiches to offer more plant based/flexitarian choices with a launch to coincide with Veganuary. We are also reviewing how we communicate our vegan offer more clearly to customers."*


Tesco told us *"we have the Tesco exclusive brand Wicked Kitchen that provides a range of vegan products across Tesco, including our front of store offering. [...] We will continue to develop a range of vegetarian and vegan sandwiches and wraps for customers to choose from."*

What we would like to see happen


Retailers have an important role in helping people make healthy and sustainable choices. This includes helping to mainstream the shift to less and better meat and dairy with people enjoying more vegetables, nuts, seeds and pulses. Retailers can support their customers by making it easy, affordable and desirable, with quality tasty products.

This challenge is too big for anyone to do alone. Retailers, chefs, government and investors all have a role to play in creating the conditions for people to move towards more healthy and sustainable diets. The scale of the challenge of mitigating climate change and sustaining biodiversity means we need to act fast.


To accelerate progress, we are calling on retailers to...



Provide more meat-free lunch options by increasing the range of delicious plant-based sandwiches.



Make provenance of ingredient meat clear on packets.



Commit to better meat and dairy by offering products that meet a certified credible standard, such as free range.



Eating Better is an alliance of over 60 organisations accelerating action for less and better meat and dairy for health, environment, animal welfare and social justice. We inspire and equip people, business and government, so that we can all eat better.

www.eating-better.org • comms@eating-better.org

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How we conducted our survey

We surveyed sandwiches from eleven retailers in March and April 2019. We included any ready to eat sandwich, wrap, baguette, sub roll, focaccia or toast.

They were assigned a category according to their main filling ingredient: meat, fish, cheese, egg and plant-based. For the purpose of this survey, we identified the main ingredient from the title and front-of-pack description. We defined 'plant-based' as sandwiches where the title implies vegetable and pulses as the main ingredients, while animal products may be present in smaller quantities. We collected additional data on the type of meat used, and whether meat sandwiches contained cheese or egg as well.

We collected information on the origin of meat products, as stated on the packaging or in the store's published sourcing policies. We also surveyed the sourcing of 'better' meat by inspecting packages for labels and certificates that indicate higher standards of welfare.

We collected data online and through in-store visits. Additionally, we asked all retailers surveyed to provide a full list of their current vegetarian and plant based sandwiches, and we cross-checked and supplemented our findings with this data. We also asked retailers about their plans to extend their plant-based sandwich ranges, as well as details of any commitments towards helping customers shift towards more plant-based eating with less and better meat and dairy.

Tracking change on the high street

We have previously surveyed retailers on their offer of healthier and sustainable foods. Take a look at Eating Better's Sandwiches Unwrapped surveys in **2015** and **2016**, and **Ready Meals Survey** in 2018. We also track signs of improvement in the sector, check out our **Companies leading the way 2017**.

References

- 1 Chicken sandwiches contain mostly breast meat. To calculate the number of chickens we have used average figures: 41% of the chicken carcass weight is breast, and an average broiler chicken is 1,5 kg.
- 2 YouGov for Eating Better (2019) Survey: Eating Less Meat. Online at: <http://bit.ly/EBYouGov2019>. Total sample size was 1,823 adults. Fieldwork was undertaken between 28th - 29th March 2019. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).