



Market Report

A Snapshot of your Marketing Sector

Sandwich Bar

This pack has been designed to provide information on setting up a business in the **Sandwich Bar** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **December 2024**.

What do I need to know about the Sandwich Bar market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ Food markets sell a range of pizzas, sandwiches, and wraps with these products expected to account for **25.2% (£368.1m) of industry revenue in 2025**. People aged between 35 and 49 have the highest disposable incomes and are most likely to visit food markets during weekday lunchtimes as they seek a gourmet and international options for a lunchtime meal. (IBISWorld, *Food Markets in the UK*, December 2024).
- ◆ In 2022, over **£512m was spent by UK consumers on sandwiches, rolls, and baguettes**. This was a large increase in value of roughly **£66m** in comparison to the previous year. After a drop in spending in 2020, spending has been on an increase for two consecutive years in a row. In 2021, 7.83 million people ate at a coffee shop or sandwich bar on a weekday and 7.55 million at the weekend. In 2022, 20.09 million people ate at a coffee shop or sandwich bar, an increase from 13.78 million in 2021. In January 2024, 39% of survey respondents stated that they bought food or drinks at cafes once a fortnight, with 34% having never bought food or drinks at cafes. (Statista, *Food & Nutrition*, June 2023).
- ◆ Sandwich and wrap sales have seen strong growth due to consumers seeking convenience and on-the-go food as their lives get busier. Changing consumer preferences and rising health consciousness has driven bakery cafes to innovate in introducing vegan, gluten-free and healthy alternatives. IBISWorld reports that within the Bakery Café industry, **bread and sandwiches** are expected to account for the **largest share of industry revenue in 2023-24, at 47.5% (£548.2m)**. (IBISWorld, *Bakery Cafes in the UK*, October 2023).
- ◆ More consumers are eating on the go with an **increase of 7% from 2021 to 2024** with a preference for takeaway sandwiches, salads or meals. **Fast food outlets** are the most **preferred takeaway lunch venue** for **67%** of survey respondents in 2024 (a slight drop from 71% in 2023), and **sandwich or bakery shops** in second place for **50%** of survey respondents (both in 2023 and 2024). (Mintel, *Attitudes to Lunch out of home UK*, July 2024).
- ◆ Supermarkets are the most used retail channel for buying lunchtime foods, attracting 58% of category buyers. **Pre-packed sandwiches** are the most popular retail lunch choice, eaten by **37% of people**. Own-label dominates the pre-packaged fresh sandwiches market, reflecting the challenges brands face in creating tangible, inimitable points of difference. (Mintel, *Lunchtime Foods in Retail UK*, February 2022).
- ◆ The national organisation for this industry is [The British Sandwich & Food to Go Association](#). Other industry bodies include [UK Hospitality Association](#), [Scotland Food and Drink](#), the [Scottish Food and Drink Association](#) and the [Café Life Association](#).

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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **Mintel – Attitudes to Lunch out of Home UK (July 2024).** While convenience food is favoured, lunch purchases in 2024 at supermarkets and convenience stores decreased by 6 percentage points (pp) to 43% and decreased at food outlets by 4pp to 37%, perhaps due to the cost savings of preparing a packed lunch. 44% of consumers in the 16-44 age bracket work from home and prepare home lunches more often compared to before COVID-19. The predominant consideration for lunchtime eating out is 'low cost' at 40% for weekdays and 29% for weekends.
- ◆ **Mintel – Bread UK (December 2024).** Packaged sliced square loaf bread is most likely to be used to make sandwiches (a quick main meal) or toast (quick breakfast), by 47% and 51% of eaters of bread respectively, reflecting its continuing importance for breakfasts and lunches. Among the wider population, one in three eat sliced bread daily due to its affordability; though this bread product is under pressure from more expensive products such as rolls/baguettes, wraps, and artisan loaves. Wraps and naans have proved popular in providing more interesting lunches at home rather than eating out or takeaways.
- ◆ **IBISWorld – Bread & Bakery Goods Production in the UK (July 2024).** Bread's staple status kept sales resilient in the face of weak incomes and falling consumer spending during the cost-of-living crisis. Most people see it as a necessity – according to UK flour millers, 99.8% of UK households purchase bread regularly and will likely continue to purchase it regardless of price rises. Bread can be hard to differentiate, though newer trends have created alternative breads such as seeded, sourdough and other artisanal styles; and seen the incorporation of alternative ingredients.

There are also a number of online resources you may find helpful:

- ◆ **British Baker** – articles [How bakers can tap into the UK's growing food-to-go market \(August 2024\)](#), [UK bread market predicted to grow by £1.2bn driven by health and sustainability \(February 2024\)](#), [Sandwich trends 2023: how is the market changing? \(October 2023\)?](#)
- ◆ [Café Life Magazine](#) and [International Sandwich & Food to Go News](#) - monthly trade publications for sandwich shop owners and café and coffee shop owners in the UK. The publications provide market news and trends, reviews of new tea, coffee and snack products, and details of trade events.
- ◆ **National Library of Scotland** – there is access to free business e-Resources by [registering here](#). These include a start-up guide **Sandwich Shop, October 2023** which offers some key market trends and information on trading issues and legislation

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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