

# Deli Sandwiches Peak in Summer

More Americans are turning to their supermarket deli for quick, ready-made meal solutions. Within deli sandwiches specifically, consumers spent \$1,244 per store per week nationally, satisfying this desire for ready-to-eat convenience during the 52 weeks ending Nov. 28, 2009. This was an increase of 2.7% compared to the previous 52-week period. Deli sandwiches accounted for 6.3% of total deli department dollar sales.

Submarine sandwiches and bread sandwiches were the top two subcategories within deli sandwiches, representing 52.5% and 35.2% respectively. Within the submarine sandwiches segment, turkey and Italian varieties

accounted for 18.1% and 16.3% of total dollar sales over the past 52 weeks; these trends were consistent with last year. Turkey and ham were the top performing proteins in the bread sandwich segment, the former accounting for 11.3% of sales, and the latter 6.6%. These trends were also consistent with the previous year.

Wraps/Roll-ups ranked third with 5.6% of dollar sales. Other subcategories, which include focaccia/panini sandwiches, croissant sandwiches, combos, pita sandwiches and bagel sandwiches, represented the remaining 6.7% of deli sandwiches dollar sales.

Deli sandwich sales peaked dur-

ing summer months, as picnic season got into full swing. The highest sales were reported during the weeks ending July 18, 2009 (\$1,396 per store per week) and August 8, 2009 (\$1,395 per store per week).

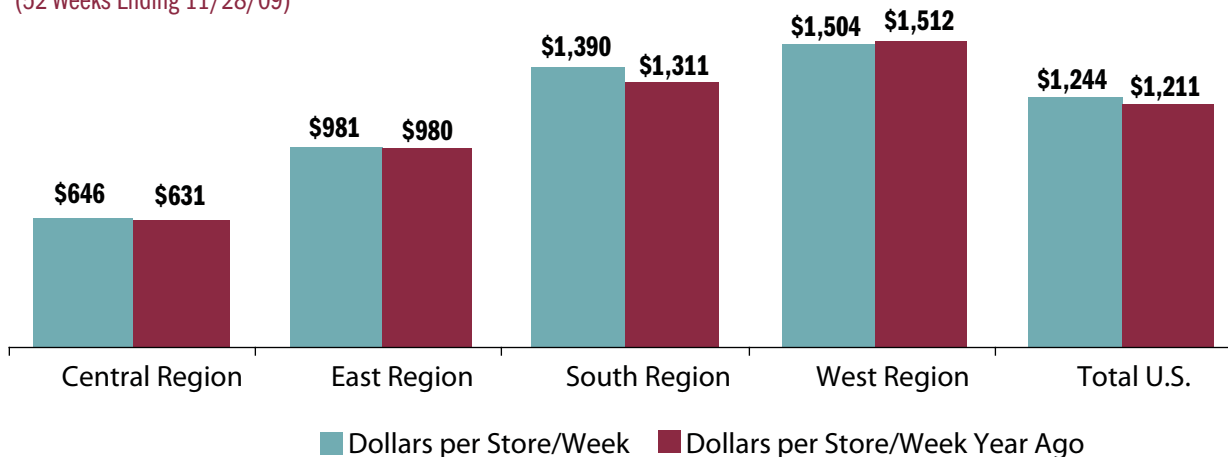
Bread sandwiches saw the largest increase during both weeks. Bread sandwiches peaked at \$531 during the week ending August 8, 2009, an increase of 21.4% over the average per-store-per-week sales during the 52-week period.

Nationally, lavosh/pita sandwich sales increased the most when comparing year to year, up 26.6%, followed by submarine sandwiches and bread sandwiches, up 6.9% and 0.7%

**Figure 1**

## Deli Sandwich Dollar Sales Dollars Per Store Per Week by Region

(52 Weeks Ending 11/28/09)



respectively. The remaining segments recorded losses versus prior year. The largest losses occurred in combos, down 14.1%.

The West region sold the most deli sandwiches per store per week with sales of \$1,504. This was a decrease of 0.5% versus the previous 52-week period. Dollar contribution to department was second highest in the West at 8.1%. Consistent with the national trend, combos demonstrated the greatest rate of loss in the West region, down 30.8%.

The South region had the second highest sales velocity, up 6% compared to the previous period with \$1,390 per store per week. The South recorded the highest contri-

buton, accounting for 9.2% of total deli dollar sales. Growth was highest in the South due to gains in bread, submarine, and combo sandwiches.

Sales in the East region increased nominally, up 0.1% to \$981. In the East sandwiches accounted for 3.1% of deli department sales. Lavosh/pita sandwiches demonstrated the largest growth in the East region, up 59.7%. Croissant sandwiches demonstrated the second largest growth at 11.2%.

The Central region had the lowest deli sandwich velocity, with \$646 per store per week, up 2.4% compared to the previous period. Similar the Central region, sandwiches in the East made up a small share of overall deli department sales, 3.1%. Bread and

submarine sandwiches contributed to growth in the Central region, up 12.5% and 1.2% respectively.

This sales review is provided by the Perishables Group, Inc., Chicago, IL, an independent consulting firm focused on innovation and creating value for clients in the fresh food industry. Reported results are for Dec. 6, 2008, through Nov. 28, 2009, representing more than 63% of national supermarket ACV share. Sales data provided by Perishables Group FreshFacts powered by Nielsen.

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