

What 550 Sandwiches

Taught Us About Flavor.

(And Why Sauce Wins)

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Sandwich innovation is exploding!

But what's actually driving it? We analyzed the entire LSR sandwich segment to uncover the answers... and what we found may surprise you.

How we did it:

- 550 sandwiches analyzed from LSR menus (Jan '24–Jan '26)
- 250,000 consumer ratings from Datassential SCORES
- Regression analysis on every sandwich component
- All handheld sandwiches included (hot & cold)
**Burgers and hot dogs excluded*



Just how real is the sandwich **BOOM**?

Across LSR menus, operators are launching more sandwiches than ever – making the category one of the fastest-growing platforms for menu innovation.

Sandwich Innovation By the Numbers:

550+

new or LTO sandwich items launched since January 2024, across 79 national restaurant chains

23

new sandwich introductions per month, on average

90%

of consumers have purchased a sandwich from a restaurant in the past year

57%

average LSR increase of sandwich items on QSR menus (+37%) and Fast Casual menus (+76%)



One sandwich element stands out.

After analyzing 550 sandwich launches and nearly 250,000 consumer ratings, data suggests that it's not the protein or the carrier that makes or breaks a sandwich... it's the sauce!

Consumer Ratings | Sandwich Components

Metric	Top Rated Attribute
Overall SCORE	Protein
Unbranded Purchase Intent	Sauce
Branded Purchase Intent	Sauce
Uniqueness	Sauce
Draw	Sauce
Value	Price/Segment

Regression analysis reflects data gathered from ~250,000 consumer ratings of 550 LSR sandwich launches from Jan '24 - Jan '26 – Ranked attributes include carrier, protein, cheese, and sauce/condiment.

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“Sauce is what gives a sandwich its identity. It turns a familiar protein into something craveable, signals craftsmanship, and lets us differentiate the menu without complicating operations.”

- Chef Gavin Estes



What is it about **sauce**?

Sauces drive the largest increase in consumer perceptions of Purchase Intent, Draw and Uniqueness.

83%

of operators say having the right sauces is essential to creating craveable dishes their customers love.

60%

of consumers look forward to a signature sauce, condiment, or dressing at a restaurant.



Not all sauces are created equal...

Some sauces drive consumer demand, while others help operators command higher prices.

Demand Drivers

Sauce	Average Purchase Intent	Price Lift
Ranch	+5.8	+\$0.28
Garlic	+14.1	+\$1.26
Aioli	+12.0	+\$0.97

Top Premium Sauces by PI lift and price lift

- The **Garlic / Aioli / Ranch** trio performs across a wide range of sandwiches and proteins, consistently boosting purchase intent with modest price lifts.

Premium Builders

Sauce	Average Purchase Intent	Price Lift
Horseradish	+20.6	+\$4.30
BBQ	+8.2	+\$1.67

Top Premium Sauces by PI lift and price lift

- **Horseradish** and **BBQ** tend to command higher prices, often appearing alongside premium proteins like steak, brisket, and roast beef.

Multi-flavored sauces are a cheat code.

Sauces that combine multiple flavors drive higher interest and premium perception on sandwiches.

Sandwich ratings based on sauce flavor profiles:

Metric	1 Flavor	2 Flavors	Lift
Uniqueness	50.5	58.8	16%
Draw	61.3	65.1	6%
Premium Price Point	\$7.81	\$8.81	13%

Examples: Peppercorn Ranch, Parmesan Garlic Aioli, Havarti-Dill Cheese Spread



The **role** of each sandwich component.

From carrier to sauce, each element influences satisfaction, quality perception, and draw differently.

Sauce

The strongest lever for interest, draw, and uniqueness — it's what gets people off the couch to try something new.

Cheese

The classic side-kick — pairability with protein is important for cheese to impact sandwich drivers.



Protein

The key driver of satisfaction — signaling premium quality, especially with steak, brisket, and roast beef.

Carrier

Quietly signals quality and price — carriers like brioche vs. white bread shape premium perception.

Key findings to-go.

- **Sandwiches are everywhere.** It's easy to lose share – and the need to differentiate has never been more important.
- Whether creating a signature sandwich, seasonal LTO or line extension, understand that **consumers can get a sandwich anywhere**, including at home.
- **Sauce is the biggest sandwich lever** when activating consumer perceptions of craveability, draw, and premium perceptions.
- **Adding a multi-flavored sauce is a cheat code for elevating the entire sandwich build** in the consumers mind. Aioli, garlic, ranch, cheese spreads or even flavored butters provide the flexibility to be paired with multiple flavor profiles (heat, citrus, sweet), signaling you can't make this at home.

Want to **elevate** your sandwich game?

Make Rubix Your First Call

When the pressure is on and the stakes are high, we're the team you call. Rubix proudly partners with some of the most exciting, high-momentum brands (like yours!) to move faster from idea to execution – blending culinary creativity, food science, and consumer insight to build products that actually perform. Not just great ideas on paper, but scalable, operationally sound solutions that drive real, measurable results.

In sandwiches, that means bold, on-trend flavor systems built to deliver on taste, texture, and consistency – without slowing you down. Here is just a taste of what we offer but our best work doesn't live on slides...

[Let's Get to Work](#)



Sauces & Glazes

Fully customizable – delivering flavor, performance, and presentation to turn everyday sandwiches into craveable creations.



Compound Butters

Versatile and cross-functional, enhancing sandwiches with custom flavor and consistency, from 100% butter to cost-effective blends.



Cheese Spreads

Ready-to-serve and packed with flavor – use as a dip or spread for a premium sandwich add-on.



Aiolis

Creamy, rich, and packed with flavor – spread or drizzle to put a gourmet twist on any sandwich.



Segment Report: Sandwiches
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