

## A Short History of Espresso in Italy and the World

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The global boom in ‘out of home’ coffee consumption since the mid-1990s has generated renewed interest in the world of coffee among both academics and the general public. The politics of coffee production and market governance have been investigated from a wide variety of stances, yet what these studies have tended to neglect is that this boom has been driven by a profound shift in consumer preferences from traditional ‘national’ coffee beverage styles to those based upon the use of espresso.

Espresso is the product of a preparation process that evolved in Italy over the first half of the 20th century, and by now has become almost an icon of the country itself. ‘Italian-style coffee’ – by which I mean all forms of coffee beverage using an espresso base - has thus followed the trajectory of other ‘typical’ foodstuffs, such as pasta and pizza, in projecting Italian cuisine, lifestyle and culture abroad. Yet, as food historians have demonstrated, this was a far more complex and contested process than might seem apparent. Pasta and pizza were essentially regional dishes whose incorporation into an Italian ‘national’ cuisine, was as much a consequence of, rather than a precursor to, their success abroad<sup>1</sup>. Indeed the ‘globalisation’ of Italian style coffee can also be read as an example of the homogenisation of consumer tastes, a reading whose popularity has been increased by its close association with the coffee shop format that was popularised in the United States. Consequently contests over the ‘authenticity’, ‘nationality’ and ‘ownership’ of espresso form a key part of this story.

Explaining the global success of Italian-style coffee requires us to construct a ‘commodity biography’ of espresso in which the influences of technological innovation and business structures are integrated with an analysis of changing social and cultural practices within consumer societies to explain how, when, where and why ‘Italian-style’ coffee beverages evolved and were transferred between markets. Such a commodity biography should be able to demonstrate how the relationship between consumers and producers around the globe has been mediated – both

materially and metaphorically - through the product itself. Crucially, for example, as Italian-style coffee has spread into new markets so the beverage recipes have been adapted and emphasis has shifted to the milk-based derivative drinks rather than espresso itself. This was why I entitled my research project into the globalisation of espresso ‘The Cappuccino Conquests’<sup>2</sup>.

## **The Origins of Espresso**

The history of coffee in Italy long predates that of ‘Italian-style’ coffee. Venice was one of the first ports to begin importing coffee into Europe from the 1570s, and shops selling beans had opened by the 1640s, although the first recorded coffee house did not open until 1683<sup>3</sup>. During the following century, famous cafes appeared major cities such as Florian’s in Venice and the Caffè Greco in Rome. Carlo Goldoni’s comedy *La Bottega del Caffè* (1750) captured the cultural phenomenon of the coffee houses while Pietro Verri’s Milanese journal *Il Caffè* (1764-66) was at the centre of the Italian enlightenment. In the 19th century the coffee houses of Turin hosted meetings among leaders of the *Risorgimento*. Yet while these cafes are justly celebrated for their splendour and tradition, they were in many ways parallels of a common European experience as seen in the role of cafes in the French revolution or the culture and politics of the Habsburg Empire. The coffee served in the Italian coffee houses was prepared and served in pots using infusion-based methods consistent with the prevailing practices across Europe<sup>4</sup>. Hence, while these cafes form an important part of the history of coffee in Italy, they do not form part of the history of ‘Italian coffee’.

That story really begins in 1901 when Luigi Bezzera, a Milanese inventor registered a patent for a coffee machine that consisted of an upright, gas heated, brass boiler fired by carbon, which produced steam that was used to force hot water through the coffee cake clamped at the group head, under a pressure of around 0.75 atmospheres. This patent was acquired by the manufacturer Desidero Pavoni in 1903, who used it to produce a machine known as the Ideale of 1905 which is generally held to be the first espresso machine to enter into commercial production. Although Pavoni was the primary manufacturer, he also allowed Bezzera to continue to produce machines under his own name – with both producers taking stands at the 1906 Fiera di Milano<sup>5</sup>.

The value of the machine to caterers was that an individual cup of coffee could now be prepared ‘expressly’ for the customer on request. The use of the term ‘espresso’ also reflected the fact that the water was ‘expressed’ through the coffee, and played on the supposed speed of delivery of the coffee, although this actually took at least 45 seconds. A 1922 poster designed by Leonetto Cappiello for the other leading coffee-machine manufacturer in the first half of the century, Victoria Arduino of Turin employed the Futurist artistic style that was then in vogue, to make a visual play on the idea of the express train (also known as an *espresso*) and the way that both the coffee machine and the locomotive were driven by steam.

The coffee produced by these machines was very different from espresso as we know it today. Due to contamination from the steam, and the high temperatures in the group head of around 130-140C, the coffee appeared black, rather than brown, and tasted burnt. It lacked any of the crema that we now associate with espresso, due to the low pressures at which it was produced, and was served significantly longer, as the cup size in Cappiello’s poster makes clear. All in all, the resultant brew was probably closer to filter coffee than a contemporary espresso.

The machines were particularly suited to the so-called ‘American bars’ amongst the working urban bourgeoisie as places to socialise while transacting business, or at the end of the day. Whereas coffee in the traditional cafes was served by waiters to seated guests at a table, in the American bar, the clientele stood on one side of the enclosed bar and purchased drinks from an attendant who served them from the other. The first of these bars is reputed to have been the Caffè Manaresi, opened in Florence in 1898, and nicknamed ‘Caffè dei Ritti’ by locals because the patrons consumed their beverages standing up<sup>6</sup>. The espresso machine facilitated this speedier service and stood on the counter itself – often adding to the decor and theatre of the establishment as the large size of the machines afforded plenty of space for decoration in accordance with the tastes of the time – so that the Art Deco or ‘Liberty’ styling popular in the first two decades of the century gave way to an austere Fascist aesthetic during the 1930s.

The number of bars and cafes serving espresso grew gradually in the first three decades of the twentieth century, though coffee drinking ‘out of home’ remained largely confined to the upper and middle classes. This circumscribed market led the main machine manufacturers, principally Pavoni in Milan and Victoria Arduino in Turin, to become heavily reliant on their exports to France, Germany and Central Europe<sup>7</sup>. Nonetheless a significant number of artisanal coffee machine manufacturers were established in this period, particularly in the vicinity of Milan where the 1939 trade directory listed 22 companies including Bezzera, Carimati, Pavoni, Snider and Universal<sup>8</sup>.

Coffee consumption per capita increased slowly in Italy reaching 1.2kg per annum in the 1920s. However, the new Fascist regime regarded coffee as a luxury import. At the time of the 1926 ‘Battle of the Lira’, the installation of new espresso machines in bars was briefly banned in an attempt to restrict imports of coffee, although hotels serving foreigners were exempted, suggesting that there was already a recognition of the importance of espresso to Italy’s image. The impact of the currency revaluation also disrupted the terms of foreign trade on which the machine-makers depended. Domestic consumption was progressively driven down during the 1930s, averaging just 0.8kg per capita, a consequence of the regime’s introduction of high import duties as part of its striving towards autarchy<sup>9</sup>. With the outbreak of the war, real coffee disappeared. Perhaps the most important Fascist contribution to the development of Italian coffee culture was that the term ‘*barista*’ made its appearance in Italian as an alternative to the American *barman* – no doubt in deference to the regime’s desire to purge the language of foreign influences<sup>10</sup>.

Members of the coffee industry were well aware that the quality of the beverages prepared by the pre-war espresso machines often left a lot to be desired, due principally to contamination and burning of the coffee by the steam. Several innovations were patented in the 1930s to try and correct this. Francesco Illy, founder of the Illycaffè roastery in Trieste, for example, registered the Illetta, a machine that worked with compressed air in 1935, but never bought it into production. In 1938 a Milanese engineer named Cremonese died having patented a screw-press piston to power the water through the coffee, leaving the rights to this to his wife, Rosetta Scorza. In the same year, Achille Gaggia, a bar owner with a particular interest in

coffee, also registered a patent for a rotating handle piston to do the same job. It appears that this could potentially have infringed Scorza's patent, and he paid her for the rights to this. Again, however, with the decline in coffee consumption, followed by the outbreak of war, there was little point in producing this.

The revolution in the history of espresso came in 1947 when Gaggia registered a new patent, this time for a lever operated piston incorporating gearing and a spring. This was simple to operate by hand, and would force hot water, drawn directly from the boiler, through the coffee cake. The use of the piston meant extraction now took place under nine atmospheres of pressure which resulted in essential oils and colloids from the coffee creating a mousse or *crema* on top of the resultant beverage. Today this is seen as its defining characteristic of espresso; however at the time this new beverage was renamed *caffè crema*, cream coffee, in order to distinguish it from the pre-existing espresso beverages.

In 1948, the first Gaggia classica lever machines appeared, manufactured for him by Ernesto Valente of the Faema light engineering company. The slogans on the Gaggia machine made clear its revolutionary nature – 'Crema caffè naturale' and 'It works without steam'. Over the next decade innovations within the industry took place at a remarkable rate as manufacturers attempted to appropriate and improve the new technology. Nearly all of the leading companies were based in or around Milan where ideas, components and personnel flowed between the various workshops. The Cimbali company replaced the spring-loaded piston which required considerable strength to operate with hydraulic levers, Pavoni – inspired by Gio Ponti - turned the boiler on its side to make long horizontal machines allowing the barista to interact with his customers, but it was Ernesto Valente, who had split from Gaggia in 1950, who came up with the most radical innovation in 1961, introducing an electric pump into his Faema E61 machine, which was operated by a simple switch. Instead of taking the water from the boiler, the pump drew it directly from the mains, pressurized it, and then passed it through a heat exchanger before it reached the group-head. This machine was therefore capable of 'continuous erogation' i.e. drawing water from the mains on demand, and was dubbed semi-automatic as it left the barman in control over the length and parameters of the extraction, but did not

require him to provide the power for the process. Such semi-automatic machines remain the standard operating tool in Italy today<sup>11</sup>.

The arrival of caffè crema marked not only the creation of a distinctive Italian-style coffee, but also the birth of a mass Italian coffee culture, premised on the fact that coffee outside the home now tasted very different from that made within it. The driving force behind this development was the modernization of the Italian economy which saw industry overtake agriculture as the leading employment sector during the 1950s with a concomitant mass migration from the countryside to the city. The new arrivals gathered in small bars to socialize and watch the first Italian television transmissions. As coffee was one of the cheapest items available, it often served as the effective price for admission, particularly for women. Frequently these were known as 'Bar Sport' – places in which the customers gathered to watch or listen to their favourite teams, set up fan clubs and place bets on the government operated, football results game, Totocalcio, introduced in 1946. A new coffee cocktail, Caffè Sport appeared to accompany this activity.

The number of bar and café licences in Italy rose from 84,250 in 1956 to 95,727 in 1961, and reached 118,029 in 1971. By contrast the number of licences for restaurants, *trattorie* and *osterie* was greater than that for bars in 1956 at 93,958, but remained roughly stable over the next decade and a half, reaching a mere 94,608 in 1971<sup>12</sup>. By 2001 there were c.141,000 bars and cafès in Italy compared to only 86,000 restaurants,

Within these bars an Italian culture of coffee consumption developed, incorporating a new set of rules and rituals. These built on the 'stand-up' culture of the turn of the century bars, reinforced by the anti-inflationary laws that had been intermittently in function since 1911, and gave local authorities the right to impose a maximum price for certain 'basic' articles of consumption, including a cup of coffee<sup>13</sup>. Prices were usually determined by the authorities in discussion with the representatives of the local trade federations, a process formalized under the corporate state and retained in the post-war republic. Proprietors naturally wanted to supply this price-controlled coffee with the minimum amount of service, allowing them to charge more if the drink was served at a table. Consequently the practice of drinking espresso standing

at the bar became entrenched within the culture by customers who saw no reason to pay extra for coffee, particularly when it was primarily taken as a digestive drink in a concentrated, quickly consumed, form.

Confirmation of the incorporation of ‘coffee at the bar’ into the daily ritual of Italian life arrived from a variety of sources. In 1950, the great lexicographer, Alfredo Panzini noted sourly in his dictionary of new words entering the language:

‘CAFFÈ *Bottega di caffè* nel Settecento, *caffè* nel Ottocento dai placidi divani. Caffè Greco, caffè Florian, caffè Pedrocchi, illustri nomi del passato. Oggi il rapido *bar* e anche gli operai vogliono caffè<sup>14</sup>..

A successor volume to Panzini published in 1963 revealed that the term *caffèista* was now being used in a jocular fashion to indicate ‘Chi beve molti caffè’, and even distinguished between a cappuccinista and an espressista<sup>15</sup>. One can only assume that these were the kinds of people involved in the consumer ‘strikes’ against bars deemed to be charging excessive prices during the inflationary years of the 1970s – more proof of the extent to which coffee outside the home was seen as an integral part of Italian existence<sup>16</sup>. In 1976 Stefano Benni’s *Bar Sport* immortalised this new locale within Italian literature<sup>17</sup>.

The economic miracle also saw a significant increase in at home consumption as the high import duties on coffee that had outlived the Fascist regime were removed<sup>18</sup>. Average annual consumption per capita rose from 1.5 kg in the 1950s to 2.5 kg in the 1960s<sup>19</sup>. Lavazza expanded rapidly becoming the first roaster to break out of a regional market, building its position via the emergence of new communication and distribution channels that appeared in the period such as television and supermarkets. In 1951 the Turin-based company was selling 1.9m kg. of roasted coffee, over half of which was destined for the surrounding regions of Piedmont and Valle d’Aosta. By 1960 this had reached 3.5m kg., while in 1966, following the opening of its new production plant (the largest in Europe) the company was selling over 10m kg. of coffee a year: its position being consolidated by tightening of regulations surrounding counterfeiting in the mid-1960s that further eroded the hold of the unbranded loose coffee once found in local grocers<sup>20</sup>. Lavazza’s early advertisements used to stress

the exotic origins of the product – as in the case of Caballero and Carmencita, the animated Latin-American coffee beans whose love affair was followed by watchers of Carosello, Italian state television's nightly sequence of commercials transmitted between 1963 and 1976. Thereafter the company used Italian celebrities to endorse the product in settings stressing consumption of the product rather than the origins of the bean - a symbol of the domestication of coffee itself.

Three main ports developed serving the coffee roasting industry, each closely connected to the presence of a dominant roaster. Lavazza contributed heavily to the development of Genova and an infrastructure of coffee support services at the port. Similarly Illy, Hausbrandt and the other roasters based in Trieste helped establish it as the primary centre for the import of African and Asian coffee into Italy. In 1959, in an attempt to win back market share from these exporters, the Istituto Brasiliero do Cafè warehouse opened in the city, and its fortunes have recently been revived by becoming designated as a point of delivery for Robusta contracts traded on the LIFFE coffee exchange in London in 2002. The third most important port was Naples, centre of the coffee industry in the South from where the roaster Cafè do Brazil conquered the local market, before beginning to promote its Kimbo brand on a national scale in the 1980s<sup>21</sup>.

Since the 1970s, the Italian coffee industry has followed a predictable path to maturity, largely dictated by the economic conditions of the country. The 1980s saw an expansion in the numbers of bars, but also an increasing differentiation between those trading from the morning into early evening, with a focus on coffee; and an expanding number of enterprises primarily targeted at the evening entertainment market that targeting young adults with alcohol offerings to the fore. Consolidation has occurred among roasters with progress in preservation techniques, combining with improvements in infrastructure to make it possible to distribute throughout the country. Nonetheless, the industry remains heavily fragmented, partly as a reflection of enduring variations in taste preferences. Broadly speaking espresso blends in the South use larger quantities of the robusta bean than in the North and are darker roasted. A 1960 report on the coffee trade for the Banca Nazionale del Lavoro had no difficulty in stating that the coffee drunk in the South, Sicily, Sardinia and parts of the Veneto was of lower quality and would not have been acceptable in other parts of



Italy<sup>22</sup>. Today, however, even the premium roaster, Illy, which produces only a single blend of espresso, composed entirely of Arabica beans, none the less sells a darker roasted version of this, specifically designed for the Southern market.

The most distinctive feature of Italian coffee culture remains the difference between at home and out of home consumption. The advent of caffè crema was particularly important in preserving this, particularly given the subsequent spread of the moka pot – a stovetop percolator first produced by Bialetti in 1935 whose sales took off during the economic miracle and which can today be found in over 90% of Italian households<sup>23</sup>. While the moka effectively uses steam pressure to produce a coffee not dissimilar to that made by the early espresso machines, it is still insufficient to yield the crema that characterizes coffee in a bar. Until recently this was also true of coffee prepared in vending machines, providing bars with a substantial proportion of their revenue as employees took their coffee breaks outside the office or workshop, both in the morning and often, on their way back to work, following lunch at home. While these practices are somewhat in decline, they are also rigorously defended – for example in 2006, court workers in Genova, took industrial action in protest against a proposal to restrict them to a 15 minute morning coffee break outside the building that would have to be made up during the course of the day<sup>24</sup>.

### The Cappuccino Conquests

The first phase in the export of the culture of Italian espresso was led by the machine making sector. It proved relatively easy to transfer the developments in espresso preparation into the surrounding Mediterranean markets where differences in preference largely revolve around the size of the standard coffee (thus the Portuguese *bica* is larger than the Italian *caffè* but shorter than the standard Spanish *café*). Both Gaggia and Faema established subsidiaries in Barcelona in the 1950s – today the city is the third most important manufacturing city for commercial coffee machines behind Milan and Seattle<sup>25</sup>. The old central European markets of Austria, Hungary and Switzerland were also swift to adopt the new beverage, although some lament that this very success saw a decline in the range of traditional coffee house beverage in centres such as Vienna<sup>26</sup>.

Conventionally the success of espresso elsewhere is ascribed to the activities of Italian emigrants who were prominent in catering activities. In 1950s Germany, Italian ice cream shops turned themselves into *Eiscafé* by serving espresso from the new style machines during the winter, thus overcoming the problems deriving from an essentially seasonal income. With their outside seating and modern atmosphere these appeared to offer ordinary Germans the chance to ‘imagine’ themselves as participants in a common ‘European’ culture even during the economic and mental isolation of the years immediately after the war. Mass tourism increased exposure to Italian coffee, sparking a desire to bring the beverage back to Germany with many purchasing machines for use at home. Some student activists presented this enthusiasm as a form of political identification with the Italian communist and revolutionary fractions, though this did not prevent them from competing with their comrades to purchase the most technically advanced status symbols<sup>27</sup>. Eventually domestic manufacturers responded to this demand with Krups launching its first domestic espresso machine in 1983<sup>28</sup>.

In the United Kingdom the first coffee bar to open using a new style Gaggia machine was the Moka Bar in London’s Soho district. Both the timing and the location were significant. 1952 was the year that coffee ceased to be rationed in the UK, and it became one of a number of commodities that were (re)discovered by consumers. Soho was part of the central entertainment district of London, containing a large number of hotels, restaurants, pubs and clubs whose staff were primarily drawn from émigré populations, notably the Anglo-Italian community. However, the proprietors of the Moka bar were Maurice and Rose Ross, a Jewish couple from Leeds. Like most of those involved in the coffee bar explosion, Ross came from outside the catering trade, and was not a member of the Italian or Anglo-Italian community, although he had holidayed in the country which is where, it is believed, he acquired the machine in the first place<sup>29</sup>. While coffee bars traded on their bohemian and continental aspects, authenticity was less important than constructing an exotic environment incorporating a wide variety of reference points: thus the first of these outlets to advertise in ‘The Times’ offered “first class cuisine .. Espresso and genuine American hamburgers”<sup>30</sup>.

Coffee was largely taken as cappuccino, rather than espresso, as the photo reportages of the time make clear. There were several reasons for this. Firstly the British were used to combining their hot beverages with milk, whether tea or coffee, and already had experience of foamed milk through the earlier import of milk bars from America. Second, the very act of frothing the milk was key to the theatricality of the experience offered in the coffee bar – both in terms of the sights and sounds of its preparation, and the exotic appearance of the beverage itself. Finally we need to consider the social function of the beverages. Coffee bars were destination venues where one would meet with others to socialise, hence there was a preference for larger beverages that took longer to consume, and appeared to offer more ‘value’ than a short espresso. Similarly it was also preferable that they should be served hotter and thus take time to cool to a drinkable temperature. A publicity stunt in the Moka bar played on this by offering customers use of an electric razor with which to: “Have a shave while you drink our coffee”.<sup>31</sup>

By the early 1960s, new methods of coffee preparation that retained an eye-catching element were taking over in the catering market, notably pour and serve filter coffee, kept warm in a jug on an electric plate, and the Cona coffee system in which the coffee was brewed in a glass container and kept warm over a naked flame. These methods required less training and facilitated quicker service than was possible with an espresso machine. Many coffee bars turned into quick service cafès that placed more emphasis on eating as a way of increasing income to meet rising property rents, while the social functions of the coffee lounge with the result that Italian-style coffees became increasingly confined to those ethnic catering outlets established by the emigrant community.

Of course elements of that community had been prominent in the initial success of Italian coffee – notably Pino Riservato, the Italian commercial traveller to the UK who had obtained the Gaggia agency for the country, allegedly after having been appalled by the quality of coffee on offer. Other companies also appointed representatives from within the community, but Riservato and his successor Lorenzo Perotti appear to have established the pre-eminence of Gaggia through an alliance with the leading UK coffee roaster, the Kenyan Coffee Company (also known as

Kenco, now part of Kraft) whose espresso blend – known as Moka-Ris – it was claimed, had captured 75% of the espresso market<sup>32</sup>.

However many of the pre-existing Anglo-Italian cafes were slow to adopt the new espresso machines. This was primarily because the Italian cafès catered to a working class clientele for whom the priority was ‘tea, tea, tea’ while proprietors were anxious to prove themselves to be ‘more British than the British’ following the mass internment of male members of the Italian community during the war<sup>33</sup>. Espresso machines made poor tea as the water temperature in the boiler was too low and the capacity too small. Instead, many proprietors preferred to use the machines made by Still and Son of London whose under the counter boiler fed two reservoirs, one storing boiling water for tea, the other containing coffee produced under steam pressure – i.e. nearer to the old style of espresso - along with a steaming wand that could be used to warm the milk. This enabled them to produce a so-called ‘frothy coffee’.

Interior photographs of these Italian cafès nearly always feature a Still’s machine above the counter<sup>34</sup>. Even in the case of those proprietors who did obtain an espresso machine, notably those who developed the cheap informal Italian restaurants that were successful in the 1960s, this was nearly always a lever-style Gaggia believed to deliver ‘authenticity’ through its visual presence: semi-automatic machines rarely appeared in the UK. In London these cafes were usually supplied by the Anglo-Italian roasters: Drury Tea and Coffee, established by the Olmi brothers in 1936 and trading under a name deliberately chosen to hide its Italian ownership, and Costa coffee established in 1976 by Sergio and Bruno Costa, two brothers who emigrated to the UK from the countryside near Piacenza in 1971. At this stage, however, the bulk of their business remained in filter coffee and tea<sup>35</sup>.

By now then, espresso and cappuccino had shifted from being exotic beverages to serving as ethnic markers within a cheap and cheerful cuisine. As such they were regarded with as much suspicion as admiration. A 1980 sketch from the hit BBC comedy show ‘Not the Nine O’Clock News’ encapsulated this: set in a ‘classic’ Anglo-Italian cafè, with check tablecloths and chianti bottles serving as candle holders, it watches a clearly Italianate barman prepare a cappuccino while crouching

down behind a Gaggia lever machine. Imitating the noise of the machine, he instead prepares an instant coffee to which he adds powdered milk, dishwashing soap and cigarette ash, before blowing bubbles into the mixture with a straw.

In the United States too coffee houses became closely associated with youth cultures, providing a stage for performances by the ‘beatnik’ poets and popular musicians on both the East and West Coasts. Again beverages were significantly altered or augmented to suit American tastes – espresso often arrived as ‘Roman espresso’ with the addition of a twist of lemon peel while cappuccino was served with cinnamon or nutmeg topping as standard and frequently included whipped cream (making it closer to the Viennese *kapuziner*)<sup>36</sup>. Once the coffee houses lost popularity, not least as the spread of television reduced the market for out-of-house entertainment<sup>37</sup>, so espresso again became confined to the Italo-American enclaves of the big cities, such as North Beach in San Francisco.

We can see very clearly then, that the initial spread of Italian-style coffee involved considerable adjustments to the beverages themselves, and, above all, the emphasis within the beverage offer. In 1950s Italy cappuccino was considered a ‘ladies’ drink’, – it was only in the 1980s that it began to be ordered more frequently outside the home, and even then only as a breakfast drink given the Italian aversion to consuming milk on a full stomach<sup>38</sup>. It was local importers who realized the potential of the cappuccino for promoting consumption abroad. Furthermore it was entrepreneurs from outside the ethnic and catering communities who were most prominent in placing Italian coffee in new settings that facilitated its incorporation into local practices and subcultures. Conversely the émigré community was particularly prone to producing a ‘fake’ frothy coffee that met their own needs, and those of their clientele, but was yet further removed from the ‘authentic’ espresso culture that had evolved in Italy itself.

### The lure of the latte.

At this juncture, then, Italian coffee abroad was far from being a quality beverage. Experts within the coffee world suggested that the taste of espresso in England was not that dissimilar from chewing a pencil, while the Italo-American coffeehouses

were accused of serving poor quality blends that had probably been dumped by Italian coffee firms as past their sell-by date<sup>39</sup>. However this was part of a more general malaise as the major roasters competed for the domestic market by reducing prices to the customer. This was achieved by lowering the quality of the coffee used, by increasing the number of 'faults' allowed in the coffee traded on the principle C market in New York, and by increasing the amount of (generally) lower quality robusta coffee incorporated in the blend. The latter approach was rendered even easier by the liberalisation and eventual collapse of the international coffee agreement in the 1980s, leading to the removal of controls on supply and the encouragement of new entrants into large-scale coffee growing such as Vietnam by the international financial community, resulting in a surplus of coffee and a concomitant fall in prices.

It was to counter these trends that the speciality coffee movement began in the United States that sought to link all elements within the coffee chain from growers to retailers in a campaign to raise standards. The Speciality Coffee Association of America was founded in 1982 promoting the use of premium quality beans that had a distinctive taste in the cup – preferable drawn from a single region or estate<sup>40</sup>. Originally the focus was on the retailing of beans for home consumption, but during the 1980s some so-called 'gourmet retailers' began to promote them by serving coffees in-store. With little marketing budget to speak of, much of their effort was based on the power of getting the consumer to taste the 'quality in the cup' through strategies such as sampling, local sponsorship and guerilla marketing, on the basis that once people tasted the difference between ordinary and premium coffee, they would be converted to the latter.

The question was what beverages could be used to communicate these values to potential customers. Here the specialty movement proved more flexible, encouraging the use of flavoured coffee beans, and the addition of syrups that increased sweetness while appearing to add value. However the key innovation was the use of espresso-based beverages as part of the offer because, as one manual explained: 'the inclusion of espresso drinks and the attractive appearance of an espresso machine gives the operation an 'upscale' quality image. This, in turn, can promote sales of other specialty coffees'<sup>41</sup>. That, however, turned out not to be the case. Rather the appeal of the espresso-based beverages proved to be such that, by 1994, gourmet retailers

were reporting that in-store sales were outstripping those of traditionally-brewed premium coffee<sup>42</sup>.

This was despite the fact that ‘the general public’s perception of espresso’, was, ‘that short, dark, bitter cup of stuff that I have to put 10 packets of sugar into to be able to drink it’ as one of the early coffee cart entrepreneurs in Seattle put it<sup>43</sup>.

Instead, 75% of sales on the Seattle carts in 1990 were of ‘caffè latte’ – essentially a version of café au lait in which ‘textured’ i.e. steamed hot milk was poured onto an espresso base<sup>44</sup>. In contrast to café au lait, or brewed ‘white’ coffee, however, the taste of the coffee was much stronger due to the much higher levels of extraction obtained during espresso, as opposed to conventional, coffee preparation. This taste was assisted in ‘cutting through’ the milk by the fact that the roasts employed by the speciality roasters in the United States tended to be very dark – the so-called French roast (in Italy roasts are nearer to medium). This was probably an inheritance of the desire to add ‘character’ to the coffee – but in the opinion of many specialists actually resulted in high quality coffee being spoilt by excessive roasting. None the less the end result was a beverage that appealed greatly to customers due to its combination of taste and texture, while the visual theatricality of its preparation testified to its hand-made character. The final touch was the addition of so-called ‘latte art’ – the creation of designs on top of the beverage using different pouring techniques – that confirmed the uniqueness of each cup.

Within the coffee shops, the work of the barista (a term popularised by the speciality movement) was made more visible by positioning semi-automatic machines on the back of the counter, in view of the customer. The beverages proved not to be price sensitive with customers happy to pay more for perceived quality – indeed a key feature of their early success was that many employees preferred to purchase a takeaway ‘speciality’ coffee, rather than drink the freely available filter drinks provided at the workplace. The development of the personal computer made this easier as refreshment breaks could be taken according to individual preference rather than at convenient moments in the production cycle. The later spread of the laptop and the provision of wireless-free internet intensified this trend enabling coffee shops to function as alternative work places themselves.

The centre of the speciality coffee movement was the Pacific North West, and particularly Seattle. During the 1980s, as the city was transformed from an old industrial centre based on aircraft manufacturing at Boeing, into the capital of the new economy housing the headquarters of Microsoft, so a new business emerged based around coffee carts serving take-away beverages to commuters at the monorail stops and the ferries across the Puget Sound<sup>45</sup>. In 1990 there were over 200 such carts serving the city, though their numbers were later eclipsed by the coffee shops that sprang up to provide both takeaway and sit down service<sup>46</sup>.

In 1989 the SCAA calculated there were 585 speciality coffee outlets in the USA – by 1994 this had reached 3,600<sup>47</sup>. So who were their patrons? A Gallup survey conducted in the same year found that the most valuable indicators were age, education, income and region with the typical gourmet coffee drinker was a college educated 18-34 year old with a household income of over \$50,000 living in the West or mid-Atlantic states. In short, a member of what David Brooks subsequently identified as a new upper class of Bobo's – Bourgeois Bohemians – who had created an America where “upscale suburbs were suddenly dotted with arty coffeehouses where people drank little European coffees and listened to alternative music” and “it was impossible to tell an espresso-sipping artist from a cappuccino-gulping banker”<sup>48</sup>. Italian coffee drinking had become a lifestyle choice, one indicating membership of a status group in which the cultural capital obtainable through education, generational cohort and regional location, were more important than income and occupation.

The key protagonist of that revolution was undoubtedly Starbucks, which opened as a gourmet roaster and bean retailer in Seattle in 1971, but was re-invented as a coffee shop chain by Howard Schultz in 1987, allegedly inspired by trips to Milan and Verona. Schultz however was sensible to the need to adjust the beverages to meet customer demands. A year prior to taking over Starbucks, he had opened a coffee shop called Il Giornale. As he recounts:

In that first store, we were determined to re-create a true Italian-style coffee bar. Our primary mission was to be authentic. We didn't want to do anything to dilute the integrity of the espresso and the Italian coffee bar experience in Seattle. For music, we played only Italian opera. The baristas wore white



shirts and bow ties. All service was stand-up with no seating... The menu was covered with Italian words. Even the décor was Italian.

Bit by bit we realized many of those details weren't appropriate for Seattle. People started complaining about the incessant opera. The bow ties proved impractical. Customers who weren't in a hurry wanted chairs. Some of the Italian foods and drinks needed to be translated.<sup>49</sup>

This translation was applied to the coffee offer itself. A Starbucks small cappuccino, for instance, is about twice the size of a standard Italian one, but still only contains a single shot of espresso. Not only did the larger volume appear to give greater value, it also softened the taste. Meanwhile the use of low fat or soy milk appeared to make them healthier, while the use of Italianate names (most infamously frappuccino which does not even contain espresso), added 'authenticity' and 'value' into the beverage.

Starbucks did not invent the coffee shop formula, but they were the first to brand it and reproduce it across the country, standardizing both the beverages and the setting. An initial public offering (IPO) of its stock in 1992 enabled Starbucks to extend its reach beyond the North West so that by 1994, of the 3,600 speciality outlets in the US, 425 were owned by Starbucks<sup>50</sup>. By 2000 of 12,600 US coffee houses, 2,776 were owned by Starbucks and in 2005 of 21,400 coffeehouses, 7,551 were part of the chain<sup>51</sup>.

So where were the Italians in all this? The overall answer has to be that many missed out on the initial opportunities offered by the speciality revolution. Famously, Faema refused to back Schultz on the basis that Americans would never learn to drink espresso<sup>52</sup>. They were right - but as Schultz proved, this didn't mean wouldn't drink the milk-based Italian-style coffee beverages such as latte.

In the end, however, another Italian machine maker would prove to be the beneficiary of US tastes – the artisanal company La Marzocco, based in Florence. Marzocco was founded by Giuseppe Bambi in 1927. He passed the firm on to his son Piero, who continued to design the company's machines. In 1970, Bambi produced a new GS series of machines which utilised two separate boilers, one for hot water for coffee-making, and the other exclusively for the generation of steam which could be used for

the frothing of milk. While this had considerable advantages for improving temperature stability at the brew head, it was the steaming power that made it so attractive in the American market where this function was in far more demand than the Italian. Kent Bakke, a Seattleite distributing machines to the local market, was impressed by this feature and began supplying them to local companies including Starbucks. As the coffee chain grew, so too did the demand for Marzocco machines, leading eventually to the establishment of a US factory in Seattle itself. Although Starbucks shifted to using a Swiss made Supra-automatic machine after 1999, leading to the closure of the US subsidiary, Marzocco continues to be a highly successful company, exporting 97% of its high-end products abroad<sup>53</sup>.

Meanwhile Italian roasters were now better positioned to export their products overseas. In particular, Illycaffè exploited the opportunities presented by the speciality coffee movement to promote its single 100% Arabica blend as a premium product, with its charismatic president Dr. Ernesto Illy, making regular appearances at events such as the SCAA conferences, notably his keynote address to the Seattle meeting in 1992. Illy concentrated on building a presence in the upmarket restaurant sector - establishing the brand's qualities in the minds of consumers - before entering the retail sector. . A global communications strategy was adopted on the basis that Illy's customers were better defined as members of a single transnational class of educated consumers, than one segmented by national boundaries. Illycaffè's foreign revenues rose from under 20% of the company's income in 1990 to exceed domestic ones for the first time in 2005<sup>54</sup>.

### **The Global Espresso**

Illy's success was indicative of the new export opportunities opened up for roasters by the reproduction of the American coffee-shop across much of the developed and developing world. During the 1970s, exports of roasted coffee averaged less than 1m kg. with the principal importer being Vatican city. France, Germany and Holland overtook the Holy See in the 1980s, but even in 1988, the amount of coffee being re-exported from Italy was under 12m kg.. In the 1990s, however, this trade took off, with re-exports reaching 58m kg in 1998 and 132.5m kg in 2007<sup>55</sup>.

A large part of those sales are into the 'out of home' HORECA market. It is here that the triumph of espresso-based beverages over traditional preparation styles has been most acute because consumers are reluctant to pay for beverages that they can prepare equally well at home. While it would be foolish to deny the leading role of the US in developing the new coffee shop format, it is also evident that much of the appeal of the espresso-based beverages is due to their Italian origins. This was bolstered by a change in foreign perceptions of Italy in the later 1980s and early 1990s, epitomised in the international success of fashion designers such as Armani, musicians such as Pavarotti, and the staging of the Italia '90 world cup. This re-evaluation coincided with the development of a pan-European youth culture linked through music (notably MTV Europe), cheap air travel, and increased student mobility.

These changes had already begun to impact upon the coffee sector. The 1980s boom in the UK had seen a growth in eating out, with Italian cuisine being repositioned as a high quality product, in contrast to the cheap and cheerful Spaghetti and Pizza houses of the 1970s. New restaurants served espresso, preferably from a Gaggia, to demonstrate their seriousness<sup>56</sup>. Even London's Anglo-Italian cafés replaced their Stills machines with genuine espresso makers as part of increasing the 'Italianess' of their offer, renaming their 'white coffees' as 'caffè latte', and replacing traditional sandwiches with panini<sup>57</sup>. Costa Coffee began opening espresso outlets on mainline stations at the end of the 1980s, staffing them with members of Anglo-Italian families known to the Costas, who operated them on a quasi franchise system<sup>58</sup>.

Once coffee shops began to appear in Europe, many chains sought to brand themselves as Italian to distinguish themselves from Starbucks and its imitators, and 'leverage' the 'authenticity' that could be generated from this. The four largest chains in Europe are Starbucks (1,118 outlets in 13 countries in Oct 2008) Costa Coffee (849 in 11), McCafe (773 in 13) and Caffè Nero (388, operating solely in the UK which contains around 40% of the overall branded coffee shop market). While Starbucks and McCafe are clearly American in origin, Costa and Nero stress their Italian influence. Costa Coffee was purchased by the British brewing conglomerate Whitbread in 1995 to translate the Starbucks formula into the UK, while Caffè Nero was founded at the same time, and now one of the twenty fastest growing companies in Europe. Both these companies trade heavily on the value implicit in an Italian

brand identity. Costa's communications materials all reiterate their claim to be "Italian about Coffee", while it has now begun retailing coffee under the brand name "Costa Italia"<sup>59</sup>. For many years after the Whitbread takeover, the Costa brothers remained a strong presence in the branding, with emphasis then switched to the Anglo-Italian roastery manager, Gino Amasanti, and his successor Gennaro Pellicciaia. No mention is ever made of Whitbread in these materials.

Caffé Nero meanwhile has traded on an image of authenticity that has been cultivated by creating a more edgy continental feel to its shops through the furnishings, store policies such as allowing smoking in certain sections prior to the ban, and recruiting many its baristas from the pool of young European students residing in London. An early review of the chain by "Tatler" magazine, proclaiming it served "the best espresso this side of Milan" has become the company's signature tag line – exploiting the linkage to the fashion capital at the heart of Italy's new upmarket image. Clearly then 'Italianess' is conceived as conferring value on the beverages, whereas, by contrast none of the major US coffee shop chains has cultivated an Italian image.

It would be easy to attack these brands for advertising themselves under false pretences – neither is Italian owned, neither roasts its coffee in Italy, indeed Nero does not even roast its coffee itself. Yet what exactly constitutes authenticity in the world of espresso. Costa's espresso blend is not just created by (Anglo)-Italians, its organolyptic qualities certainly resemble those of the classic Italian espresso, even if Costa serves its beverages in sizes that match those of Starbucks. Nero, in this respect, sticks closer to the Italian recipes, its standards dictated by its first, Anglo-Italian, operations director, while both it and Costa are wedded to the use of traditional espresso machines: Nero using Faema and Costa a proprietary machine made for it by CMA, the manufacturer based in the Veneto.

Authenticity then is a slippery concept as the story of the minor British chain, Puccino's demonstrates. This chain, founded by two British entrepreneurs, made much of the fact that it served Italian roasted coffee in Italian sizes, while happily admitting in its slogans that it had been 'Pretending to be Italian since 1995'. Yet when that coffee supplier, Segafredo Zanetti, took a controlling stake in the company in 2004, one of its first innovations was to move to American cup sizes. Segafredo

has now become one of a number of Italian roasters who have extended their operations into the coffee shop sector, with 277 outlets, and has now reached the point that it now roasts most of its coffee outside Italy itself. Among other leading Italian roasters operating chains are Lavazza with 152 units of Cafe Roma, mainly in Spain, and the new Espressamente Illy concept stores, of which 39 were opened in 2008 alone<sup>60</sup>. Of course, these activities are not confined to Europe. The burgeoning coffee culture in South East Asia and the so-called Bric developing economies (Brazil, Russia, China, India) has seen Italian roasters directing much of their effort into these areas with Lavazza acquiring the 150 outlet Barista coffee shop chain in India in 2007, as well as two major Brazilian roasters.

Globalisation has created new opportunities for the Italian coffee industry at a time when the domestic market has become saturated. Among both roasters and machine makers, foreign sales have become the key motor of growth. In 2005, for example, coffee exports rose by 11.4%, while domestic consumption fell by c2-3%<sup>61</sup>. In 2006 exports increased by a record 20% and a further 12% in 2007. Now 30% of the coffee roasted in Italy is now exported, while it has been suggested that of the c120,000 machines manufactured annually, at least 70% are produced by Italian companies. In total, the Italian espresso industry probably generates around €1bn in foreign earnings for the country, €700m in roasted coffee, €200m through machines and €100m in the sale of other coffee related equipment<sup>62</sup>.

The real question for the Italian espresso industry is probably less how to leverage its authentic heritage in foreign markets, than how to preserve it in the domestic one. This is unlikely to be challenged by foreign entrants, such as the US style coffee shops, if only because of the differences in customer habits and attitudes to coffee. While the coffee shop model demands a premium price be paid for coffee, and trades on the basis of selling a 'twenty minute experience' to the customer, the Italian coffee bar survives on the premise of serving a low-priced cup of espresso to be consumed with the minimum of service. However, consumer demand appears to be in decline, in part because technical innovations have improved the espresso offer from home, office and vending machines to constitute a genuine alternative to that provided at the bar s themselves. Ironically, therefore, just as espresso has become an international

icon of Italianess abroad, its most serious challenge will be to sustain that position at home.

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<sup>1</sup> See A. Capatti, M. Montanari, *Italian Cuisine. A Cultural History*, Columbia UP, New York, 2003; C. Helstosky, *Garlic and Oil*, Berg, Oxford, 2004, and, in particular, F. La Cecla, *La pasta e la pizza*, Mulino, Bologna, 1998.

<sup>2</sup> Funded by the AHRC/ESRC Cultures of Consumption Research Programme – see the project website [www.cappuccinoconquests.org.uk](http://www.cappuccinoconquests.org.uk)

<sup>3</sup> M. Ellis, *The Coffee House. A Cultural History*, Weidenfeld and Nicholson, London, 2004, p. 82; F. and R. Illy, *From Coffee to Espresso*, Mondadori, Milan, 2002 p.114.

<sup>4</sup> For an extensive account of the history of coffee pots and coffee makers see E and J. Bramah, *Coffee Makers. 300 years of Art and Design*, Quiller, London, 1995; also A Fumagalli, *Macchine da caffè. Coffee makers*, BE-MA Editrice, Miano, 1990.

<sup>5</sup> The best guide to the development of coffee machines is Ian Bersten, *Coffee Floats, Tea Sinks*, Helian, Adelaide, 1993.

<sup>6</sup> *Il Caffè. Produzione e Commercio*, Banca Nazionale del Lavoro, Roma, 1960

<sup>7</sup> On these companies see F. Capponi, *La Victoria Arduino. 100 anni di caffè espresso nel mondo*, WIP, Belforte di Chienti, 2005; E. Locatelli, *La Pavoni. 1905-2005*, Pavoni, Milano, 2005.

<sup>8</sup> *Guida di Milano*, Savallo, Milano, 1939

<sup>9</sup> *Sommario di statistiche Storiche dell'Italia, 1861-1975*, ISTAT (Istituto centrale di statistica), Rome, 1976, tav. 119.

<sup>10</sup> A. Panzini, *Supplemento ai dizionari italiani*, Hoepli, Milan, 6.ed. 1931, p.56.

<sup>11</sup> The best account of these technical advances is in Bersten, *Coffee Floats, Tea Sinks*, pp. 99-146.

<sup>12</sup> *Sommario di statistiche Storiche dell'Italia, 1861-1975*, ISTAT (Istituto centrale di statistica), Rome, 1976, tav. 91

<sup>13</sup> G Minutelli, *La disciplina del commercio*, Pirola, Milan, 1967,42-3.

<sup>14</sup> A. Panzini, *Dizionario modern delle parole che non si trovano nei dizionari comuni*, Hoepli, Milano, 9<sup>th</sup> ed, 1950 p. 79

<sup>15</sup> B.Migliorini, *Parole Nuove. Appendice di dodicimila voci al "dizionario modern" di Alfredo Panzini*, Hoepli, Milan, 1963, pp. 45, 50, 108.

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- <sup>16</sup> P. Clough “Romans boycott coffee in protest over price” *The Times*, London, 15 April 1977, p.5
- <sup>17</sup> S. Benni, *Bar Sport*, Mondadori, Segrate, 1976
- <sup>18</sup> M. Segal, ‘Coffee Roasters in Switzerland – catering for every taste’, *Café Europa*, 25, June 2006, p.18. In 1958 Italy imposed duties amounting to \$1.21 on a kilo of imported coffee compared to just \$0.17 in Switzerland. *Il Caffè*. p.92.
- <sup>19</sup> *Sommario di statistiche storiche*, ibid.
- <sup>20</sup> *Lavazza Coffee Magazine. Special Issue 110 years*. n. 31, July 2005, pp. 14-17; *Lavazza. From 1895 to the Third Millennium*, Turin, 2000, pp.20-30.
- <sup>21</sup> Interview with Maria Rubino, Café do Brasil, Melito di Napoli, 7 giugno 2005
- <sup>22</sup> *Il Caffè. Produzione e Commercio*. p.111
- <sup>23</sup> J. Schnapp, ‘The Romance of Caffeine and Aluminum’, *Critical Inquiry*, Vol. 28, No. 1, Autumn, 2001, pp. 244-69.
- <sup>24</sup> ‘Genova – battaglia sindacale per la pausa caffè’, *Comunicaffè*, electronic newsletter, Milan, 27 Feb 2006.
- <sup>25</sup> Currently both Spanish brands are owned by the Quality Espresso Company: [http://www.qualityespresso.net/company/our\\_company.htm](http://www.qualityespresso.net/company/our_company.htm)
- <sup>26</sup> G. Loibelsberger, “The examination of the Archduke – a short history of Viennese coffee houses”, *Café Europa*, 27, Dec. 2006, p.25
- <sup>27</sup> P. Bernhard, ‘La pizza sul Reno. Per una storia della cucina e della gastronomia italiana in Germania nel XX secolo’, *Memoria e Ricerca*, 23, 2006, pp.66-71.
- <sup>28</sup> <http://www.krups.com/Focus/History/Krups+History.htm>
- <sup>29</sup> Email correspondence with Sue Selwyn, 22, 23 August 2007.
- <sup>30</sup> *The Times*, 30 October 1954, p.2.
- <sup>31</sup> “Guerra e pace a Soho attorno al Caffè Espresso”, *La Voce degli Italiani*, London, December 1954, p.5
- <sup>32</sup> For further details on the structures of the ‘Italian coffee’ trade in Britain see J. Morris, “Imprenditoria italiana in Gran Bretagna. Il consumo del caffè ‘stile italiano’”, *Italia Contemporanea*, 241, 2005, pp.540-52.
- <sup>33</sup> Interview with Stefano Ispani, Managing Director of Ponti’s UK (quoting his uncle), London, 31 August 2005
- <sup>34</sup> A. Maddox, *Classic Cafes*. Black Dog, London, 2003.

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- <sup>35</sup> Interview with Aldo and Marco Olmi (Chairman and Managing Director), Drury Coffee, London, 7 September 2005.
- <sup>36</sup> *Fun with Coffee*, Pan American Coffee Bureau, New York, 1956. p.7;., *Today's Coffeeshouse (A Handbook)*, Coffee Brewing Institute Inc New York, 1964, pp.10-11.
- <sup>37</sup> L. Klinger-Vartabedian and R. Vartabedian, "Media and Discourse in the 20<sup>th</sup> Century Coffeeshouse movement", *Journal of Popular Culture*, 26, 3, 1999, pp.211-8.
- <sup>38</sup> Interview Sergio Guarneri (La Cimbali), Bernasco, 27 Jan 2005.
- <sup>39</sup> E. Bramah, *Tea and Coffee* Hutchinson, London, 1972, p.74; Interview with Ward Barbee, (Editor, *Fresh Cup*), London, 24 May 2006.
- <sup>40</sup> On the origins of the speciality coffee movement see M. Prendergast, *Uncommon Grounds*, Basic Books, New York, 1999, pp.337-67.
- <sup>41</sup> *Foodservice Director's College Coffee House Manual*, Coffee Development Group, Washington DC 1986 (Equipment sections).
- <sup>42</sup> *The 1994 Gallup Study of Awareness and use of Gourmet and Specialty Coffees Survey*, Princeton, Multi-Sponsor Surveys, Inc., May 1994.
- <sup>43</sup> W. P Ferguson, *How to open your own Espresso Cart*, Self-published manual, Seattle, 1991, p.5.
- <sup>44</sup> H. Gupta, "Espresso to go", *Seattle Times*, 24 September 1990, p.B1
- <sup>45</sup> See J. Lyons, *Selling Seattle. Representing Contemporary America*, Wallflower Press, London, 2004.
- <sup>46</sup> Ferguson, *How to open your own Espresso Cart*, p.v.
- <sup>47</sup> Figures from *Specialty Coffee Retail in the USA*, Specialty Coffee Association of America Factsheet, 2004; *Starbucks Company Factsheet*, February 2005.
- <sup>48</sup> D. Brooks, *Bobos in Paradise*, New York, Simon and Schuster, 2000, pp.9-10.
- <sup>49</sup> H. Schultz, DJ Yang, *Pour Your Heart into it.*, Hyperion, New York, 1997, p.87
- <sup>50</sup> Figures from *Specialty Coffee Retail in the USA*, Specialty Coffee Association of America Factsheet, 2004; *Starbucks Company Factsheet*, February 2005.
- <sup>51</sup> *Coffee Houses and Donut Shops*, Mintel, Chicago, Feb 2006
- <sup>52</sup> Schultz, Yang, *Pour your heart into it.* Pp.67-8;
- <sup>53</sup> Interview with Kent Bakke, Seattle, 8 January 2005; Interview with Piero Bambi, Ron Cook, Marzocco, Firenze, 7 Feb 2006.
- <sup>54</sup> Interviews with Dr. Ernesto Illy, G. Biviano (direttore commercial), Trieste, 29 October 2004



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- <sup>55</sup> Data calculated from historic statistics of the International Coffee Organisation available at <http://www.ico.org/asp/> accessed 26 October 2008.
- <sup>56</sup> Interview Jim Harding, Breakmain, Cimbali (UK), Elstree, 8 Sept 2005.
- <sup>57</sup> Interview Stefano Soldani, proprietor Bar Centrale, London, 23 August 2005
- <sup>58</sup> Interview with Gino Amasanti (General Manager), Gennaro Pellicciaia (Roastery Manager), Costa Coffee Roastery, London, 13 April 2005.
- <sup>59</sup> “Costa overhauls its food range”, *Marketing*, 16 Aug 2006, p.8
- <sup>60</sup> Allegra Strategies, Pre-report briefing on Project Cafe 8 Europe, London, Presented European Coffee Symposium, London, 17 October 2008.
- <sup>61</sup> “Federalimentare 2005”, *Comunicaffè*, 22 Feb 2006; “Caffe nel HORECA” *ibid.*, 22 August 2006.
- <sup>62</sup> V Sandalj, ‘Italy’s speciality coffee – challenges and prospects’, *Cafe Europa*, n.34, Sett 2008, p.7