



# European Review of History: Revue européenne d'histoire

ISSN: 1350-7486 (Print) 1469-8293 (Online) Journal homepage: <http://www.tandfonline.com/loi/cerh20>

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To cite this article: Jonathan Morris (2013) Why espresso? Explaining changes in European coffee preferences from a production of culture perspective, European Review of History: Revue européenne d'histoire, 20:5, 881-901, DOI: [10.1080/13507486.2013.833717](https://doi.org/10.1080/13507486.2013.833717)

To link to this article: <http://dx.doi.org/10.1080/13507486.2013.833717>



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Published online: 24 Oct 2013.



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## Why espresso? Explaining changes in European coffee preferences from a production of culture perspective

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*(Received 5 April 2013; accepted 3 May 2013)*

Since the 1990s supposedly ‘historic’ fault lines separating coffee preferences and practices across the European continent have been broken down. The consumption of Italian-style espresso-based beverages outside the home is now widespread. Much of this is drunk in branded coffee-shop outlets, based on a format popularised in the United States. This article investigates these changes employing the culture of production perspective. It is structured in three parts. The first investigates the formation of quasi-national coffee-drinking styles in the at-home and away-from-home sectors with particular reference to Italy; the second analyses the transformation of out-of-home coffee-drinking in the UK during the 1990s; and the third examines the spread of Italian-style coffee across the European continent.

**Keywords:** coffee; coffee culture; espresso; food history; McDonaldisation; production of culture

### Introduction

The last two decades have witnessed sweeping changes in coffee culture across Europe, both in terms of the coffee beverages consumed and the places in which consumption has taken place. Supposedly ‘historic’ fault lines separating regional beverage preferences and practices across the continent appear to be breaking down with the widespread adoption of Italian-style espresso-based beverages such as cappuccino, caffè latte and latte macchiato. These coffee drinks are at the centre of the offer within the ‘speciality coffee shop’ – a new service format that has spread into Europe from the United States – epitomised by the Starbucks chain, which was operating in 20 European countries as of December 2011.<sup>1</sup> This article seeks to analyse why espresso coffee achieved prominence within European popular culture during the late twentieth century, focusing on the role of ‘producers’ in effecting this transformation, and the extent to which it can be characterised as reflective of Americanisation, Europeanisation and/or Italophilia among coffee consumers.

Commentators have suggested that changes in consumer demand caused by the fundamental transformations in work and lifestyles experienced over the course of the digital revolution offer one explanation for the success of the coffee-shop format. The advent and diffusion of the personal, then portable, computer, the mobile phone and the spread of wireless connectivity have all, in turn, contributed to the creation of more autonomous ways of working. As well as enabling employees to enjoy the facilities of the coffee shop during the working day, the self-employed have increasingly adopted them as an alternative office. A 2012 survey of ‘cappuccino commerce’ suggested 22% of small business start-ups in the UK had based themselves in coffee shops to keep their overheads low.<sup>2</sup>

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Class position has often been portrayed as a constraint upon access to this cappuccino culture. Yet in 2013 the price of a regular cappuccino was recorded as being lower or equal to that for a 500 ml glass of local draught beer in 20 of the 27 EU member states.<sup>3</sup> Both these beverages are used to charge for access to a social space; the difference is that the coffee shop, although equally accessible in economic terms, is perceived as culturally exclusive in a way that the traditional drinking establishment is not. This is partly because the 'Italian-style' beverages are considered highly priced in comparison to an 'ordinary coffee', particularly when prepared in the home. The questions become, therefore, how and why some social groups (not necessarily classes) were persuaded to pay this price to change their coffee preference, and why the 'speciality coffee shop' became the place where work and sociability intermingled.

To answer these questions, this article engages explicitly with the production of culture perspective developed by sociologist Richard A. Peterson, which analyses six facets of production – technology, law and regulation, industry structure, organisation structure, occupational careers, and producers' perceptions of the market – in relation to one another.<sup>4</sup> This model moves the focus of explanations for cultural change away from autonomous shifts in consumer tastes that supposedly reflect a *Zeitgeist*, or the impact of such 'genius' innovations such as Achille Gaggia's espresso machine, towards transformations within the industries that supported the production and diffusion of new cultural outputs. Peterson's article 'Why 1955? Explaining the Advent of Rock Music', for example, highlights the importance of a shift by record producers from perceiving the market as homogeneous to heterogeneous, using the other facets of the perspective to analyse why this occurred in the mid-1950s.<sup>5</sup>

An approach that shares Peterson's focus on producers of expressive symbols was applied to coffee culture by anthropologist William Roseberry. He analysed the ways in which 'coffeemen' in the US sought to convince customers of the superior qualities of their specialty products to those of the food conglomerates. Instead of thinking of the coffee market as a single mass entity, roasters began to practise segmentation: crafting new blends to fit the desires of particular types of customers. 'Ethical' coffees (e.g. fairly traded), 'flavoured' coffees (e.g. vanilla coffee) and 'origin' coffees (e.g. Guatemalan) were all developed to appeal to different segments of the market, enabling consumers to exercise choice and discrimination by purchasing coffee that expressed their personal values and tastes. This appealed particularly to younger generations in search of goods that demonstrated what Pierre Bourdieu has called 'cultural capital' – hence Roseberry's article is entitled 'The Rise of Yuppie Coffees and the Reimagination of Class'.<sup>6</sup>

The sources and methodology adopted in the following article reflect the contemporary nature and producer focus of the approach. Like Roseberry, I have made considerable use of the trade press, 'peering over the shoulder' of the 'community of coffeemen' in order to eavesdrop on them talking to themselves, rather than to the consumer public.<sup>7</sup> Unlike him, I have taken this further by attending trade presentations and industry conferences, and consulting market-research data that is not freely available within the public domain.<sup>8</sup>

I have also utilised oral-history interviews, alongside informal (but noted) conversations and email exchanges. Following Christopher Breward in his work on fashion, I see these as ways of connecting what, adapting Goffman, might be called the 'back stage' view of the coffee industry, to the 'front end' performative aspects of producing coffee culture.<sup>9</sup> All such evidence needs to be treated as text produced with its own particular biases and objectives, and preferably triangulated (although in the absence of archives, such corroboration must often be obtained from similar sources). Nonetheless it yields information that would not be discussed in public forums, including the trade

press, such as accounts of failure, and non-attributable actions. For example, I asked one informant why he thought his coffee product had achieved such resonance with consumers as to be included in a publication listing of Britain's iconic brands. 'That's simple Jonathan,' he replied, 'we bought it' – thereby transforming the evidence that I was preparing to analyse as a reflection of consumer preference, into a manifestation of producer tactics.<sup>10</sup>

This article will contend that the same facets of production that were identified by Peterson can help explain the ways in which popular tastes and practices surrounding coffee-drinking have evolved within Europe. It is structured in three parts. The first discusses what we mean by coffee, and investigates when and why coffee-drinking preferences began to diverge across the continent. It distinguishes between the at-home and away-from-home sectors, paying particular attention to the Italian case. The second examines how the UK, traditionally a tea-drinking culture, came to embrace coffee shops so rapidly in the 1990s. The third extends this analysis to the spread of espresso across the European continent, highlighting both similarities and differences of experience. A driving question for the article concerns the particular timing of the 'Espresso Revolution': why has this apparent convergence of European tastes around Italian-style coffee only occurred over half a century after Achille Gaggia created modern-style espresso?

## The production of 'national' beverages styles until the late twentieth century

### *The 'at-home' market*

Coffee is never 'just coffee'. The beans used within a blend can come from many different origins, each with their own organoleptic qualities, which will in turn differ according to the way that they have been roasted. The beverage may be prepared using a wide variety of apparatus; it can be brewed to very different strengths and served in a wide range of sizes; it can be taken with or without additives such as milk and sugar. Even the nature of the cup from which it is drunk can transmit important messages, turning coffee into an expressive symbol. An individual's coffee choice is, as Bourdieu would have it, indicative not merely of their economic, but also their cultural, capital.

And yet coffee is frequently understood as 'just coffee'. Order a 'coffee' in Italy and you will receive an espresso, in Switzerland a café crème, in Norway a demi-tasse of strong filter coffee and in the UK (until recently) a mug of 'instant' i.e. soluble, coffee. In this way coffee can also be presented as embodying a shared set of collective tastes, converting it into a banal symbol of group identity, while reducing the individual expressive value of the beverage.

Throughout eighteenth-century Europe coffee was usually prepared by boiling the ground beans directly with water in a single pot: a method derived from the practices of the Ottomans who had introduced the beverage to the continent. During the nineteenth century, the 'drip' method of preparation, first developed in France, became dominant. The ground coffee was placed in some form of container situated between two chambers of a pot, with heated water added to the top chamber then percolating or 'dripping' down through the coffee into the bottom serving receptacle.<sup>11</sup>

At the end of the nineteenth century, coffee began to shift from being a colonial good to an industrial product. Coffee-roasting equipment started to be manufactured by firms such as that established in 1868 by van Guelpen, Lensing & von Gimborn – today known as Probat – in the Rhineland. This enabled specialist coffee-roasting enterprises to be set up, supplying ready-roasted beans to surrounding grocery stores.<sup>12</sup> The combination of the

perishability and logistics of delivery meant roasters largely operated on a local level, with the beans being sold loose and unbranded. Those branded coffee products that did develop were surrogates based upon chicory, such as the Camp Coffee produced by Paterson of Glasgow.

It was not until the twentieth century that domestic methods of coffee preparation began to diversify to the point that they started mapping onto regional boundaries. In 1908, the German housewife Melitta Bentz patented the paper filtration system that bore her name, enabling a 'cleaner' tasting cup of coffee to be produced, as well as making it easier to clear up afterwards. In 1933 the Italian Bialetti company began producing the 'moka' – a stovetop percolator that harnessed steam pressure to brew a more concentrated beverage resembling that served in bars. In the late 1930s the French company Melior started manufacturing cafetières – the original plunge-pot or 'French press' coffeemaker, which allowed the grounds to steep in the water before being separated, producing an earthier tasting beverage. In 1938, in Switzerland, Nestlé launched their soluble coffee product known as Nescafé.<sup>13</sup>

Widespread adoption of these innovations only occurred during the post-war boom years of the late 1950s and 1960s, when coffee became a readily accessible mass consumer product in Western Europe. Large scale coffee-roasters developed, taking advantage of technological developments in packaging and preservation to distribute branded roast and ground coffee through such new distribution channels as supermarkets, supported by advertising campaigns in new mediums such as radio and television. This resulted in significant concentration in both sectors: the number of coffee roasters in the Federal Republic of Germany fell from around 2000 in 1950 to 600 in 1960, while of the 300 or so coffee retail shops in Hamburg in 1960, only 10 or so exist today.<sup>14</sup>

A few key roasters established their dominance within each national market, such as Lavazza in Italy, Jacobs, Eduscho and Tschibo in Germany, Douwe Egberts in the Netherlands, and Gevalia in Sweden. Nestlé took command of the Swiss market where soluble blends accounted for over half of all coffee sold by the 1960s.<sup>15</sup>

These two trends – the concentration of the 'at-home' sector into the hands of a few larger roasters, and the diversification of preparation styles across the continent – were closely connected. Roasters could promote their coffee as best suited to the prevailing preparation method, helping to build a 'banal nationalism' around coffee amongst consumer that could protect their market share from external competitors. Their claims were not without foundation. Each preparation style requires a different grind, while markets became used to different blends and roast styles ranging from the lighter roasted Arabica bean blends prevalent in Germany and the Nordic countries through to the dark roasted robusta-based blends found in countries such as France and Italy. Such distinctions are often presented as having been historically determined: for example, the Dutch taste for dark roasted, full-bodied coffees is attributed to the colonial relationship with Java whose coffees were best prepared in that style, even though Indonesia currently supplies only 1.5% of the Netherlands' coffee imports.<sup>16</sup>

While national markets are characterised by high levels of concentration, at the European level the three leading multinationals – Nestlé, Kraft and Sara Lee – control less than 31% of the market, and have only achieved this by purchasing established 'national champion' brands. In the case of the US giants, Kraft owns Gevalia and Jacobs, purchased in 1970 and 1990 respectively; Sara Lee bought DouweEgberts in 1978.<sup>17</sup> From a production of culture perspective, then, it seems that the structures of the coffee trade combined with technological innovation in both industrial equipment and domestic apparatus produce and perpetuate distinctive 'national' coffee cultures.

### *The 'away-from-home' sector and the evolution of espresso*

Coffee preferences in and out of the home can differ significantly, however. Within the domestic setting, consumer choices may be motivated by considerations concerning ease of preparation, the time involved, and the waste generated, whereas customer expectations outside the home may centre on the nature and speed of the service, and the perception that the beverage justifies the price paid for it.

The coffee industry distinguishes between these two sectors, which are structured very differently. Leading players in one arena may have only a small presence in the other. In the 'away-from-home' or HORECA (Hotel, Restaurant and Catering) market, levels of concentration have usually remained lower, both amongst operators themselves and the coffee roasters who supply them. Industry structures also vary significantly from one region to another, as do the spaces and cultures of coffee consumption out of home.

Italy, where espresso originated, demonstrates the importance of the distinction between the at-home and away-from-home segments. With the growth of so-called American bars featuring over-the-counter service in the latter part of the nineteenth century, operators were keen to reduce the time taken to deliver coffee to customers. A number of machine manufacturers, notably La Pavoni and Victoria Arduino, started using steam to brew the coffee under pressure, thereby speeding up the extraction rate. Their 'instantaneous' coffee machines produced what they called an espresso: a fresh cup of coffee for an individual customer upon demand. Installed in elite establishments, the machines created a sense of theatre around coffee delivery, but the results often tasted burnt due to direct contact with the steam.

To combat this problem Achille Gaggia started producing machines capable of brewing coffee under high pressures by using a manually operated piston system in 1948. Other manufacturers improved upon Gaggia's innovation, producing relatively cheap, electrically powered machines capable of continuously delivering shots of coffee extracted under around nine bars of pressure. The resultant beverage was dubbed *crema caffè* (cream coffee) due to the appearance of a mousse of essential oils upon its surface. The new name was intended to emphasise the distinctiveness of the beverage.<sup>18</sup>

Italy's post-war 'economic miracle' witnessed a wave of immigration into the cities from the countryside. The numbers of neighbourhood bars serving a combination of coffee, snacks and alcoholic refreshment rose dramatically from 84,250 in 1956 to 118,029 in 1971.<sup>19</sup> These bars offered patrons a space for socialisation, whether this was as part of a short coffee break during the course of the working day, a digestive coffee taken after the main meal (still usually lunch eaten at home), or rest and relaxation during the evening – principally the after-work aperitif.<sup>20</sup>

The price of coffee within the bar was controlled by legislation dating back to 1911 that allowed town councils to impose maximum prices for certain basic articles of consumption.<sup>21</sup> The level was set following consultation with the local commercial associations whose role was strengthened during the inter-war Fascist corporative regime when membership became quasi-compulsory. Their opinions were also sought in other matters of regulation, notably applications to open new premises, and collective controls over the hours and days that they traded. During the post-war republic the associations retained the right to be consulted and in practice probably exercised more influence as they were no longer required to operate under Fascist Party discipline.<sup>22</sup>

This regulation effectively underpinned the creation of the Italian espresso bar format in that the control applied to coffee provided with minimal service to be drunk standing at a counter: the practice that became standard. By collectively agreeing to forgo margin, the small operators who dominated the bar sector, mostly employing low-cost, elastic, family



labour, were able to make the sector unattractive to external entrants who might have introduced new trading formats that constituted a threat to the sector as a whole. No coffee-bar chains developed in Italy in the twentieth century therefore because the structures of the industry made it unattractive to do so. It made more sense for roasters active in the away-from-home sector to service their clients than to enter into competition with them, particularly when the margins in the sector were so small.

Although considerable consolidation has taken place in the at-home sector, where Lavazza has maintained a market share of over 40% since the 1990s, the largest share by volume in the 'away-from-home' is that of Illy, which was estimated at just 6% in 2008.<sup>23</sup> Despite an absolute decline in the number of roasters during the 1950s and 1960s, the overall figure remains high, and is once more rising with around 900 recorded in the 2001 census.<sup>24</sup>

This tenacity is primarily the consequence of the close ties that roasters establish with their clients by furnishing them with a large number of services in return for the granting of an exclusive contract to supply coffee. The roaster 'binds the bar owner to him hand and foot' by providing machines 'free on loan', service support, staff training, branded items such as cups, and even financial assistance with loans for furnishings.<sup>25</sup> The prize is an exclusive, locked-in, supply contract that usually lasts for four to five years on terms that price the coffee at far more than it is worth in the open market; however, the risk to roasters are also high in that bars are prone to financial difficulties, with start-ups having a life expectancy of around two and a half years.<sup>26</sup>

Despite the evolution of espresso as a distinctive beverage in Italy, the development of the structures supporting the Italian coffee-bar industry mitigated against the pursuit of concentration and innovation, combining low prices, low margins and low service, all of which were reflected back into a format that developed relatively low appreciation by the consumer for the product itself. According to Giacomo Biviano, commercial director of Illy, 'in the end coffee has become like petrol, the consumer goes to any old bar,' paying little regard to what brand of coffee is served there.<sup>27</sup> Illy tries to counter this, promising operators that its brand image, based upon the high quality of its blend, will increase their customer volume; but this requires bar owners to make a leap of faith as they pay more for their coffee supply per kilo, and are therefore forced to accept a lower margin per cup, because of the capped price.

Espresso machines were adopted in some of the HORECA markets surrounding Italy, notably the 'Latin' countries of France, Spain and Portugal, as well as Austria and Switzerland during the 1950s and 1960s, all of which experienced a rise in cafés and snack bars serving an expanding urban working-class population. As in Italy, these sectors remained highly fragmented, dominated by low-margin, low-service operations. The machines were used primarily for their ability to produce coffee beverages faster, rather than to develop a distinctive espresso offer. In Switzerland, for example, the most popular beverage was café crème, a cup (as opposed to shot) of black coffee topped by a head of crema, obtained by brewing under pressure using a coarser grind. Manufacturers such as Schärff in Austria and Egro in Switzerland started producing automatic coffee machines for use in these local markets.<sup>28</sup>

North of the Alps, drip coffee remained the standard beverage outside the home. Caterers utilised bulk-brewing apparatus such as coffee urns, and the continuous pour-over jug resting on a hot plate.<sup>29</sup> Apart from a brief flurry of interest in coffee bars as a youth-focused format in the 1950s, which subsided once it became clear the beverages could not generate sufficient margin, espresso coffee remained an essentially ethnic, exotic form of the beverage on the margins of consumption, confined to those eateries operated by the Italian émigré community where it served as a marker of the 'authenticity' of the business.<sup>30</sup>

The precursor to the advent of the coffee chains in the United States was the emergence of the specialty coffee movement of small independent roasters and the 'gourmet' stores they supplied in response to concentration within the industry. Initially this focused on the sale of whole beans for home preparation. To encourage customers into the store, however, they increasingly started serving beverages on the premises as well. Starbucks, for instance, began in 1971 as a roaster/retailer in Seattle, but was transformed into a coffee-shop chain following its purchase by Howard Schultz in 1987.<sup>31</sup>

The coffee-shop format is predicated on the 'quick service' sale of coffee beverages as the principal source of revenue, making it acceptable for customers to order a beverage on its own. As well as providing a takeaway service, the coffee shop offers a comfortable seating area in which customers can dwell after they have finished their drink. The 'rent' for using this space and its associated facilities (such as washrooms, newspapers, internet access) is wrapped into the price of the coffee beverage, meaning it needs to incorporate a high mark-up, yet still appear to represent good value for money to the consumer.<sup>32</sup>

Espresso coffee drinks were well suited to this role, although while pure espresso is prevalent within the Italian coffee bar, it was cappuccino and caffè latte that proved most popular in the coffee shops. These were presented as individually prepared items that were handcrafted by the barista, foaming the milk in front of the customer. Milk-based beverages also met American consumer preferences for a sweeter taste and could be adjusted to individual preferences by increasing their size, or offering them with additional flavourings or toppings, to create such concoctions such as the 'caramel latte'.<sup>33</sup>

The combination of an Italian-style coffee with an American customer format allowed the coffee shop to support the construction of a variety of cultural references around it. The potential for interplay between these was particularly powerful within Europe where coffee shops began appearing in the mid-1990s.

### **The take-off of the coffee shop in the UK**

The breakthrough of the coffee-shop format was most pronounced in the United Kingdom where a veritable beverage revolution took place driven by the growth of branded coffee outlets. As early as 2001 coffee was being reported as having usurped tea as the leading hot beverage consumed outside the home, while in 2003 caffè latte replaced Newcastle Brown Ale in the basket of goods used to calculate the consumer price index. The symbolism of this ousting of one of the most popular styles of beer, closely linked to the declining working class in the North, by a beverage associated with the expanding Southern middle classes, was not lost among commentators.<sup>34</sup> This section investigates the reasons behind the rapid take-off of coffee shops in the mid-1990s, and why espresso-based drinks have become the mainstream 'away-from-home' coffee offer in the new millennium.

#### **Why 1995?**

On 5 November 1994, a young woman named Sahar Hashemi reported on her day researching the coffee options in the immediate vicinity of underground stations in London:

- You leave the tube station on your way to the office. Being the London we know and love, it's a cold, grey morning. [...] You need that cup of coffee.
- No choice, so you invariably enter a basic, undecorated, local sandwich bar. This is nirvana if your idea of calm and relaxation combines a healthy dose of formica, a lot of linoleum, some residual grease stains, and a smattering of grime.



- You stand in a long queue and watch staff go about their work. [...] Rows and rows of plastic tubs filled with congealed crab mayo, congealed tuna mayo, congealed egg mayo.
- The sandwich maker who is taking your money with his bare hands (note hygiene, or the lack of it) makes you a quick cappuccino on the side.
- You get your hot drink (which I am loath to call coffee) in a polystyrene cup that goes floppy in your hand. As for the lid, well, it's a flat plastic thing with a nasty little hole in it [...] meaning that if you want to walk with your coffee, burned hands are part of the experience.
- By the time you get to work, you hate the day already.<sup>35</sup>

On this occasion, however, Hashemi rather liked her day. It had confirmed what she and her brother and business partner, Bobby, suspected – that a gap in the market existed for a New York-style espresso bar business in London, which would transform the morning coffee experience:

- You enter a place distinctly designed and branded to enhance your coffee experience.
- Although you are queuing you can listen to gentle soothing music and view the delicious range of tempting coffee compliments [...].
- You are served by uniformed, highly trained 'baristas' who make your coffee to order [...].
- You take away your coffee in a specially designed and branded sturdy cup with a domed lid which doesn't take the foam off your cappuccino.
- Happiness [...] at the most stressful time of the day.<sup>36</sup>

As their business plan explained, this would allow their outlet to price 'its coffee and other products competitively with the prevailing high-end coffee prices reflecting the high quality of the coffee and its high level of customer service', moving towards the US model where 'people do not mind paying a premium for having the prestige factor of buying their coffee from a specialty store.'<sup>37</sup>

On 5 November 1995 they opened the first outlet of their Coffee Republic chain among the fashion stores and offices on South Molton Street. Shortly beforehand a similar enterprise, the Seattle Coffee Company, had set up shop in Covent Garden. The growth in the branded speciality coffee-bar sector was dramatic: including units operating in transport terminals, the overall number of outlets in the UK expanded by 846.5% in the period from 1993 to 1997. All of this growth was prior to the eventual entry of Starbucks, which opened its first store on the Kings Road in September 1998, having purchased the Seattle Coffee Company which by then had grown to 65 outlets.<sup>38</sup>

Anyone who worked in London in 1994, or for the 30 years prior to that, would instantly recognise Hashemi's description of the sandwich bar. She estimated there were some 3000 in operation, many still run by the Anglo-Italian community which had been prominent among the UK catering sector for over a century.<sup>39</sup> These were no-frills operations, focused on food, whose low service values enabled them to deliver this at a cheap price. As even the defenders of the working-men's cafés recognised:

Their interior aesthetic has become DIY, a series of stuck on posters, special offers, dishes of the day and taped-up, failing components and Formica surfaces [...]. The menus are always the same and resolutely working class; this is the gastronomy of the council estate and the manual worker.<sup>40</sup>

Yet elsewhere a so-called British food renaissance was in full swing as restaurants, food-service operators and supermarkets all offered new gastronomic experiences to the beneficiaries of the economic boom of the mid-1980s – principally private-sector workers in the South. Italian food and coffee were both heavily employed within these propositions, preparing the way for a branded beverage experience built upon the symbolic value acquired by Italian-style coffee.

Italian cuisine acquired greater cultural cachet with the opening of the high-end restaurant, the River Café in 1987, co-founded by Ruth Rogers (wife of the world-renowned architect Richard) in premises shared with her husband's practice. Serving seasonal and regional dishes, it marked a notable departure from the trattoria-style outlets that characterised the typical Italian restaurant within the capital. Many upmarket restaurants started serving espresso, as opposed to drip coffee, ensuring the machine was prominently displayed to provide visual reinforcement of their 'serious' nature.<sup>41</sup> The leading aspirational supermarket at that time, Sainsbury's, added a single-estate extra-virgin Italian olive oil to its range in 1991, vintage balsamic vinegar in 1992 and in 1993 introduced 'Italian-style sandwiches [...] in response to the recent popularity of speciality breads and the wide appeal of Italian food'.<sup>42</sup> Even its sachets of 'instant cappuccino' launched in 1991 were presented as providing access to sophisticated continental coffee.<sup>43</sup>

Branded upmarket sandwich-chain formats were established, such as Pret a Manger, founded in 1986, and Aroma in 1991, which included a more extensive coffee offer. Small café chains such as Café Rouge founded in 1989 placed more emphasis on coffee and all-day service.<sup>44</sup> The Anglo-Italian cafés and sandwich bars started to install genuine espresso machines. One proprietor recounted how he bought a Gaggia machine in 1987, switched from milky coffees to cappuccinos and substituted brown rolls filled with corned beef with ones made from panini and roast peppers.<sup>45</sup>

The coffee supplier to many of these outlets, Costa Coffee – a roastery established in South London by two Italian brothers in 1976 – started opening so-called coffee boutiques. These were stands serving espresso-based drinks, located within major transport termini from the late 1980s.<sup>46</sup> Operators took care to explain to any customers ordering an espresso that 'what you have requested is "a small, very strong black coffee."' <sup>47</sup> Costa had opened 41 boutiques by the time it was acquired by Whitbread, a large brewery, hotel and leisure group in 1995, who saw it as vehicle to reproduce the success of the coffee houses already flourishing in the US.

The established coffee and catering industry within the UK was mostly notable for its absence during the early years of the espresso explosion, however. In many ways this is explicable by the structure of the overall coffee market. The growth in coffee consumption at home in the post-war era was almost entirely driven by 'instant' coffee brands manufactured by foreign multinationals, principally Maxwell House and Nescafé – while within the HORECA sector most roasters concentrated on private-label work for suppliers who focused on supporting, rather than operating, service outlets.<sup>48</sup>

Consequently, there were few 'coffeemen' involved in the take-off of the coffee shop in Britain – a significant contrast from the growth of 'speciality' coffee within the US. More typical for the new entrepreneurs was Allan McCallum-Toppin of AMT coffee – a partnership of three brothers from Seattle who, noting the lack of coffee shops in Oxford where they were studying, opened a coffee cart in the shopping centre in 1993, and an outlet at the station in 1994. At that time, he recalled: 'None of us had had any barista training, in fact I don't think it existed in this country, it wasn't in the dictionary.'<sup>49</sup>

Instead two changes in external regulation came together to create not just the customers for the coffee shops, but their proprietors and staff. The first was the de-

regulation of the London capital markets, symbolised by the ‘Big Bang’ of 1986, which created a more cosmopolitan city as institutions circulated staff between different financial centres, principally London and New York. Many were high-net-worth individuals who were familiar not only with US-style coffee-house operations, but also knew how to raise funds. Scott Svenson, who, with his wife Ally, founded the Seattle Coffee Company, had originally come to work in the UK for the investment bank Drexel, while Bobby Hashemi of Coffee Republic had worked for Lehman Brothers in New York.

In 1997 Gerry Ford, a Californian venture capitalist operating in Europe, raised sufficient funds to buy the five coffee bars trading under the name Caffè Nero. He asked Paul Ettinger with whom he had studied at the international business school INSEAD to join him on the board as food and beverage director, because he remembered his passion for food. Ettinger recalls:

Gerry knew a lot about the food industry [...] but he’d never run a food business and I knew nothing at all, I’d never had any formal training at all, and Ben the Finance Director, he’d been working for Dixon’s and the Fraud Office, so we were really a clean sheet of paper.<sup>50</sup>

This made them heavily reliant on their operations director Antonio Motisi, who they retained from the previous ownership (‘Antonio [...] actually knew how to run a coffee bar [...]; he was our experience if we’re really honest’), but it was their combined financial and commercial acumen that enabled them to turn Caffè Nero into the third largest coffee-shop chain in the UK, a position they consolidated by taking the company public in 2001, and purchasing Aroma in 2002, as well as a number of prime sites from the by-now flagging Coffee Republic.

The second key regulation was the Maastricht Treaty on European Union of 1993, which enshrined the right of intra-EU migrants to live and work in other member states, thereby facilitating the flows of young people who financed their travel by working as baristas. Ettinger estimates that 97% of the staff in the London operations of Caffè Nero were non-British, recalling that:

There were waves of immigrants coming through London, at one time Italians, then there were Swedish [presumably after that country’s accession to the EU in 1995; JM] [...]. Young people, typically between school and university, or just left university, we train them for three weeks, they might ideally last for six months, do a great job, [...] and then they move on.<sup>51</sup>

The nationality of the baristas often fed into the identity of the coffee-shop brand. Coffee Republic recruited baristas from American students working abroad on the BUNAC scheme.<sup>52</sup> The Costa brothers had operated their coffee boutiques as quasi-franchises to families they knew from the Italian community, who Marco Costa recalled coming round to his parents’ house to deliver the takings on a Sunday evening.<sup>53</sup> Even after the change of ownership, Costa’s communications materials reiterated their claims to be ‘Italian about Coffee’, continuing to tell stories about the Costa brothers despite their having retired to Monaco, before switching to their suitably Italian roastery manager Gino Amasanti.

Caffè Nero too invested in its Italian branding, turning an early review by *Tatler* magazine proclaiming it served ‘the best espresso this side of Milan’ into its tagline. The strategy extended to its coffee operations:

It was a blend that was an actual Italian espresso blend with a small amount of robusta and that sets us apart from nearly all of our competition, it was roasted by a little old Italian guy in a garage in Bermondsey [...]. [P]eople knew if they came to Nero it was all going be around espresso [...] we never did any drip coffee. [W]e never tried to be smart, we didn’t do the big American jugs, at that time we didn’t really do iced drinks or hardly, we didn’t do the gimmicks, the syrups, so we were early on very pure [...] an Italian coffee bar.<sup>54</sup>

This policy even extended to smoking:

We were a smoking hangout from day one [...] which was part of our culture and our Italian heritage. [I]t seems incredible but at the time it was part of our brand.<sup>55</sup>

All of this was intended to differentiate the two imitation Italian brands from Starbucks, whose entry into the market led to a fierce competition for sites with the greatest footfall on the one hand, but provided the momentum for exponential growth in the overall sector on the other. Brand loyalty was unlikely to see customers deviate more than a couple of streets from their regular routes to the train station or the office. Operators attempted to extend their coverage by opening as many units as possible; locating next to competitors in a high-footfall area was less risky than conceding potential customers. Often they simply sought to oust the old-style sandwich bars and cafés whose low-service format could not generate the same revenues from a site. According to one coffee supplier:

At the beginning I lost customers when Starbucks said here's twenty grand more than your shop is worth, now get out; and they thought we'd have to sell a lot more coffee to make twenty grand so they took the money.<sup>56</sup>

The overall number of coffee shops in the UK (including independents) rose from 4756 in December 1997 to 6917 in 2001, a compound annual growth rate of 9.82%. Within this, the number of branded units rose from 371 in 1997 to 1784 in 2001 – a remarkable annual compound rate of 48.1% p.a. By 2005 the branded chains constituted 30% of the coffee-shop sector, up from 8% in 1997, while the independents' share had fallen from 82% to 56%. Coffee shops began to take off outside the capital with the proportion of branded outlets located in the regions rising from 51% in 1999 to 65% in 2005.<sup>57</sup>

### *Moving mainstream*

A consequence of the success of the branded chains was that the perception of Italian-style coffee representing premium value became well established. Other retail and service operators started introducing similar coffee offers within their enterprises to exploit this. As Table 1 shows, the fastest growing area within the coffee-shop sector since 2005 has been among such non-specialist operators as department stores, supermarkets, service-station operators and the like. That growth was facilitated by technology – notably the development of so-called super-automatic 'bean-to-cup' machines that simultaneously incorporate all the preparation stages performed by the barista in the coffee shop, to produce beverages at the touch of the button.

A second stimulus again came from regulation. The introduction of no-smoking legislation in 2007 had little direct impact upon the branded coffee chains who, with the exception of Nero, had not allowed it in the first place. Pub chains, however, were fearful

Table 1. Evolution of the UK coffee-shop market

	1997		2005		2012	
	Number	%	Number	%	Number	%
Branded	371	8	2657	30	5225	33
Non-Specialist	485	10	1252	14	4865	31
Independent	3900	82	4870	56	5464	36
TOTAL	4756		8779		15723	

Source: Allegra Strategies, *ProjectCaféUK*, 1–12 (1997–2012).

of losing a significant amount of revenue as a result of the ban, possibly up to 20%. Many therefore invested in a premium, i.e. Italian-style coffee offer, in order to develop another revenue stream in which the profit margin is much higher than on beer.<sup>58</sup> The pub chain JD Wetherspoon entered into an agreement with Lavazza, the Italian coffee roaster, and promoted its coffee heavily on the back of the credibility conveyed by the Italian brand. This was delivered through a combination of bean-to-cup and single-portion capsule machines, reducing the training needs for staff.

Other pub operators constructed similar alliances, replacing their low-priced, low-value coffee offers that complemented the core food and drink business with new ones that could drive profitability. Exploiting the newly liberalised licensing legislation of 2003 (promoted as facilitating the growth of a ‘continental café culture’), they started opening throughout the day to attract customers to sample this.<sup>59</sup>

The spread of Italian-style coffee into petrol-service stations was pioneered in the UK by Coffee Nation, which originally installed instant-coffee vending machines but found that they did not encounter great success. According to the founder Martin Dawes:

As soon as I replaced my original instant coffee machines with a gourmet espresso-based machine, added Coffee Nation-branded cups and then put the price up, the sales leapt up and I then knew I had a viable business model.<sup>60</sup>

In 2000 Dawes raised £4 million from a private-equity firm, began importing fully automatic self-service espresso machines from Seattle, and by 2007 was operating them in over 600 locations before selling the firm for £23 million in 2008.<sup>61</sup>

What is striking here is the transfer of consumer acceptance of the notion of Italian-style coffee as a quality product capable of justifying a price premium from the speciality coffee shop all the way to the petrol station. Coffee Nation was subsequently acquired by Costa who began operating it under the brand name Costa Express in 2011.<sup>62</sup> In March 2013 the price difference between a barista-prepared Costa cappuccino and the self-service version available in the filling station was just 15 pence (£2.15 v. £2.00).<sup>63</sup> The acquisition fitted into a strategy of transitioning Costa from being a coffee-shop company into a coffee brand whose offerings were available across all sectors: Costa now retails ground coffee in supermarkets and sells discs for use in Kraft’s Tassimo system that promise to ‘bring you the great taste of Costa at home’.<sup>64</sup>

While Costa has ridden the path by which Italian-style coffee has been transformed from a premium to a mainstream coffee offering, those operators who attempted to mobilise resistance to this were forced to back down. McDonald’s regularly mocked the new-style coffee culture in their British advertising (running a campaign in the London Underground in 2005, for instance, promoting their ‘freshly ground coffee without the la-di-dah’), but started serving cappuccinos and lattes in 2007 and by 2010 were outselling Costa to become the largest single seller of coffee outside the home in the UK.<sup>65</sup>

### **The ‘Espresso Revolution’ in continental Europe**

Although the UK still possesses over 40% of the total number of branded coffee outlets within Europe, the sector experienced year on year double-digit growth across the continent since 2000, peaking at 13% in 2008. Despite the financial meltdown of that year, it continues to expand rapidly with 6.8% growth recorded in 2011.<sup>66</sup> This section analyses the spread of espresso consumption throughout Europe, the business formats and cultural reference points that supported this expansion, as well as the connections and comparisons between this experience and that of the UK.

The first modern-style coffee chain in Germany was founded by Vanessa Kullman, a young fashion designer from Hamburg, who in a story not dissimilar from that of Sahar Hashemi, returned from a spell in New York to set up Balzac Coffee in her home city in 1998.<sup>67</sup> Others followed in 1999 including Einstein Coffee in Berlin, and the San Francisco Coffee Company in Munich. The same year saw the start of Italian-branded operations such as CUPnCINO in Berlin, while the first Segafredo franchised unit opened in Munich in 1999. Starbucks itself arrived in Berlin in 2002.<sup>68</sup>

An account by an industry insider in 2005 captured the dramatic changes that occurred in those years:

Coffee bars and coffee shops arose at the same time throughout Germany, initially at breakneck speed – mostly established by crossover businesses with some experience of America [...]. Coffee was torn away from the plush sofa corners of the older generation [...]. The cup of filter coffee had [...] had its day and was replaced by coffee in a new, trendy, hip form [...]. Coffee was now drunk from glasses – e.g. caffè latte, half coffee and half milk – and prepared with fully automatic coffee machines according to the Swiss tradition. At the end of the 1990s, espresso in all its variants then reached the new, young coffee drinkers. The 'espresso monopoly' of Italian restaurants, trattorias and osterias was now broken in Germany. Espresso, cappuccino and latte macchiato are words now on everyone's lips – and the milk industry is booming [...]. [S]yrups and extracts became socially acceptable [...]. It was soon recognised that there is no natural law which prescribes that only bad coffee can be drunk from a cardboard cup.<sup>69</sup>

There are several interesting features in this account. It highlights the same process of removing and repositioning Italian style coffee away from the milieu of the 'cheap' ethnically marked Italian enterprises that took place in the UK. Similar, too, was the repositioning and presentation of Italian coffee as a lifestyle product within which both drink-in and take-away culture could be presented as 'cool'. Most notable was the author's apparent lack of any sense of contradiction about amalgamating the American coffee shop format, Italian-style coffee beverages, and the use of Swiss coffee machines into a generic statement that 'Italian coffee culture conquered the German market.'<sup>70</sup> Producers presented these elements as unproblematic pieces and combined them to promote coffee as a premium product, which consumers were prepared to pay the price to acquire.

In Germany too, Italian-style coffee has become a mainstream coffee beverage outside the home. Currently the runaway market leader in the branded coffee-shop sector is McCafé – a coffee-shop unit usually located in the same property as the McDonald's fast-food franchise, but physically separated from it. This format originated in Australia and is operated by country franchise holders in Europe. The first McCafé opened in Cologne in 2003; in October 2011 there were 762 of these outlets in operation.<sup>71</sup> McCafé is now the leading operator by unit number in seven of the 14 countries in which it is trading.<sup>72</sup> Its success is particularly marked amongst two very different age groups – young adults and the over 50s, a clientele the company were particularly keen to attract, as they stopped going to the restaurant once their children had left home.<sup>73</sup>

Espresso sales account for nearly 50% of the German out-of-home market, yet in 2010 only 7.6% of that market was composed of coffee shops. The largest sector in the German out-of-home market is the bakery sector, into which coffee has crossed with many outlets now combining a coffee and seating offer, alongside their baked goods.<sup>74</sup> The leading machine suppliers to this sector are the Swiss manufacturers of fully automatic bean-to-cup machines that avoid the need for trained baristas. Franke, for example, launched its first machine with a microprocessor and an integrated milk steamer in 1994 and significantly refined it in 1996 so it could produce a freshly brewed and foamed cappuccino.<sup>75</sup> Franke machines are used in McCafé as well as in Caffè Dalluci, Germany's



second largest speciality coffee chain, which labels itself ‘a modern Italian-style coffee shop with a wide selection of speciality coffees’ but is operated by the food-service multinational the Compass Group. Starbucks famously shifted to machines made by the Swiss manufacturer Thermoplan after 1999.

This is a market in which Italy has missed out: while 70% of the professional coffee machines manufactured in Italy between 2004 and 2008 were exported, fewer than 14% of these were super-automatics.<sup>76</sup> Many chains positioning themselves as Italian use ‘traditional’ coffee machines operated by trained baristas as a way of distinguishing themselves within the market. According to Paul Ettinger, *Caffè Nero* has never contemplated switching to bean-to-cup: ‘Not ever, it’s very much part of the brand [...]. I can’t imagine we would ever change [...]; it’s against everything we believe in.’<sup>77</sup>

In Scandinavia coffee shops serving espresso-based beverages first appeared at much the same time on the European continent as they did in the UK. Again these were often founded by local entrepreneurs who were initially inspired by their experience of the format in America. In Norway the first two coffee shops appeared in Oslo in 1994, both set up by students upon their return from the United States. These introduced a ‘new invention for the Norwegians: espressos, cappuccinos and lattes [...] the whole Italian/American menu’.<sup>78</sup> The beverages contrasted sharply with the preference for black, drip-brewed coffee served in a *demi-tasse*, which was common across the Nordic nations that are the highest per capita consumers of coffee by weight in the world. As coffee shops spread throughout the region, so a distinction developed not just between drinking filter and espresso in and out of the home respectively, but also, particularly among women, of consuming the milk-based beverages within the coffee shop.<sup>79</sup>

Coffee-shop chains remain relatively small-scale and have been careful to position themselves as part of an artisan-style speciality coffee movement. *Kaffebrenneriet*, one of the two original Oslo operations, and now the leading Norwegian chain with 23 outlets in October 2011, serves high-quality single-origin coffee, and sells both beans and coffee equipment for use at home. Most chains across the Nordic region are not only locally owned, but also presented as such. *Baresso*, the leading Danish chain established in 1999, clearly references Italy, where its founder worked for many years, through its name; but it is only *Wayne’s Coffee*, a Swedish-owned chain, that consciously seeks to brand itself as American, benefitting, as analysts have suggested, from a greater openness to America amongst younger Swedes.<sup>80</sup> Starbucks meanwhile remains a relatively insignificant presence in Scandinavia.

In those regions which had first adopted espresso in the 1950s, a different dynamic can be observed, as appreciation for the Italian, and Italian-style beverages, has grown at the expense of the local variants. In Switzerland the *latte macchiato* is rapidly catching up with *café crème* in terms of preference outside the home.<sup>81</sup> In Austria, *Schärf*, the local machine manufacturers and roasters, launched the *Coffee Shop Company*, a franchise concept in 1999, serving Italian-style coffees in units ‘combining the original American concept of branded coffee shops with the premium ambiance of a traditional Viennese café’ – the latter element supplied by expanding the menu and service offer.<sup>82</sup> *McCafé* in Austria went one step further by positioning itself as incarnating ‘the new world of coffee’, a strap line employed in its television advertising which contrasted its modern Italian-style beverages with those of yesteryear, depicted in a black and white ‘silent-movie’ style setting.<sup>83</sup>

Elsewhere chains were held back by the crowded and fragmented nature of the HORECA sector. In France, local entrepreneurs established branded concepts such as *Columbus Coffee* as early as 1996, while Starbucks arrived in 2004, but despite increasing

enthusiasm for Italian-style beverages (not least among the large players in the bakery sector), growth rates remained slow.<sup>84</sup> McCafé has rapidly become the sector leader since opening its first outlet in 2007, helped by its ability to open shops within the desirable locations already occupied by the restaurants. In Italy, too, McCafé can be presented as the largest coffee chain, counting 127 outlets in 2011, compared to the 61 units of *Espressamente Illy* operated under franchise. Structural, as much as cultural, factors, explain why, with only seven branded coffee outlets per million inhabitants, Italy and France represent very different markets from Germany with 23 outlets or Austria at 36, let alone the UK with 78.<sup>85</sup>

The spread of the branded coffee chain has been interpreted as evidence of the 'McDonaldisation' of European society. This is a charge that sociologist George Ritzer – the originator of the term – has himself levelled at Starbucks' operations in the US, arguing that the experience at Starbucks is efficient, predictable, calculable and controlled by non-human technology.<sup>86</sup> Arguably McCafé and all those outlets utilising bean-to-cup coffee machines can be categorised as fitting into this model.

A number of features of the 'coffee revolution', however, contradict the notion of a straightforward Americanisation. With the exception of Starbucks, none of the major operators is American, and Starbucks, as we have seen, was a later arrival, capitalising on the groundwork that had already been done in its transatlantic shadow by local entrepreneurs adapting the coffee-shop format. Sixty-six out of the 70 leading chains operating across the European and Middle East region in 2011 were European in origin. The largest, in terms of absolute number of outlets was Costa, with the top 10 made up of two British chains, two Russian, and one each from Germany, Italy, Greece and the Netherlands, alongside the US (Starbucks) and Australia (McCafé).<sup>87</sup>

The broadest distribution in terms of country coverage was that of Segafredo Zanetti, which opened its first outlet in Paris in 1988 and is now present in 37 states. Like other Italian operators it uses franchising and licensed concepts to leverage its national heritage, even though it roasts most of its coffee outside Italy.<sup>88</sup> The reluctance of Italian companies to operate their own coffee-shop chains reflects the weakness of the domestic market discussed earlier.

In the creation of symbolic value around Italian-style coffee, producers have happily blended a wide variety of cultural reference points and practices, as the spread of espresso-based beverages in post-Soviet Europe illustrates. The British owned chain, Coffeeheaven, opened in Poland in 2000, and by 2008 had added outlets in the Czech Republic, Latvia, Slovakia, Bulgaria, Hungary and Romania. Its publicity materials claimed its coffeehouses 'feel as familiar and relaxed as a café in London, Paris or Rome [...]. [T]he Coffeeheaven concept combines the best of two converging worlds: Western experience with "new" Europe's aspirations, talent and youth.'<sup>89</sup> The Russian chain *Shokoladnica*, founded in 2001 and now the seventh largest in Europe, serves 'traditional' chocolate specialities alongside a contemporary coffee-shop beverage menu.<sup>90</sup>

As consumption of Italian-style coffee became mainstream, a so-called 'third wave' artisanal culture evolved beyond this. This originated with the foundation of the Speciality Coffee Association of Europe in 1998, which instituted the World Barista Championships, jointly organised with the Speciality Coffee Association of America. Winners of these events have often gone on to set up speciality cafés or roasteries in their own right, and are frequently used to endorse high-end machines by manufacturers, who also compete to have their machine adopted for official use in the contest.

This created a new career structure for those working within the coffee industry, and led to the establishment of transnational networks, linked by social media, that supported the

emergence of new, upmarket, enterprises. Bonanza Coffee, a ‘third-wave’ roaster café opened in Berlin in 2007 was described by its founder as having been created from ‘open source’ information from the net.<sup>91</sup> The Coffeemia chain in Moscow, which serves seasonal coffee using a variety of high-end techniques, was founded by two young entrepreneurs in 2001, immediately joined the SCAE, first entered a barista into the 2003 WBC, and now sends its baristas on exchange to Brazil, London and Australia.<sup>92</sup> In London there are over 150 artisanal coffee shops, many supplied by the 2007 WBC champion James Hoffman, of Square Mile Coffee roasters. Of these, at least a third are reckoned to be run by émigrés from Australia and New Zealand.<sup>93</sup> As Italian-style coffee offers become mainstream within Europe, it is these artisan providers who are presenting new beverage and brewing styles that may again change the cultural meanings around coffee.

### Conclusion: coffee and the production of culture

This article has traced how coffee in Europe has been transformed from a beverage that was presented as essentially an everyday product with relatively little symbolic value, into one whose perceived value was such that it could support a premium price which, in turn, allowed it to be presented in such a way as to justify this. Italian-style coffees, around which this transformation was built, have become so popular within many European coffee cultures that they are not only influencing the out-of-home, but also the at-home sector, where Nespresso capsules have achieved annual growth rates of over 30% p.a. since 2000, by presenting themselves as delivering a premium espresso experience.<sup>94</sup>

Analysing the ‘espresso revolution’ from the production of culture perspective, the article has demonstrated how changes in interrelated facets have cumulated and facilitated the shift from national coffee cultures to Italian-style espresso within a few years after 1995. *Technology* was fundamental to advances in espresso production, but this was not, in itself, sufficient to produce an immediate impact upon consumption habits (the ‘genius’ innovation). It was not Gaggia’s machines, but the cheaper semi-automatics of the 1960s that drove the expansion of espresso culture in Italy. The bean-to-cup machines of the 1990s were more important in the mainstreaming of Italian-style coffee, rather than establishing its initial premium position. Even in the case of Nespresso, the system had been launched in 1986, but was initially targeted at the office and restaurant sectors, only later becoming a beneficiary of the coffee revolution.

*Regulation* contributed significantly to the production of coffee culture, whether in terms of its shaping of the structures of the Italian bar market, or through the impacts of measures such as no-smoking legislation leading to an expansion of the provision of Italian-style coffee: for that matter the expansion of the EU created unexpected consequences by making available a labour force of foreign baristas within the UK.

The ‘espresso revolution’ is principally a story about the structures of the coffee industry and the ways that new entrants came into the industry with very different perceptions of the market. The *industry structures* that developed over the first half of the twentieth century were such that power became concentrated among the giant roasters within the ‘at-home’ sector, who transformed coffee into an everyday product for preparing coffee according to a prevalent ‘national’ style. In the HORECA sector, a much weaker set of operators were bound together in structures that stifled innovation, not least because of the prevailing low margins within the service industry.

Local entrepreneurs from outside the industry (both individual and corporate) were able to move into a market that they perceived existed in Europe, partly based on what had already happened in the US, partly on the increased interest in food and drink products in

general, and Italian ones in particular, effectively investing these with symbolic capital. As start-up businesses, unconstrained by *organisational structures* or *career* hierarchies, their founders were free to follow their instincts, providing they could access the necessary funding. Many came from backgrounds in the financial industry which helped them to do just that.

The existing industry conceived of the *market* for coffee as a homogenous one in which competition between providers would essentially be based on price. In contrast, the new operators understood the market as a segmented one in which certain groups would respond to offers based around service, quality and the symbolic values embodied by Italian-style coffee. European entrepreneurs proved adept at presenting these within formats that playfully blended and subverted national reference points as props that justified premium pricing. The cumulative effect of these interventions was that coffee-drinking acquired expressive power as a demonstration of cultural capital.

In his seminal set of observations on the 'psychosociology' of food consumption, Roland Barthes suggested that in societies where basic nutritional needs are easily met 'food has a constant tendency to transform itself into situation': that is, its meaning is determined by the contexts in which it is consumed. Writing in 1950s France he claimed that there was no better illustration of this than coffee, which had once been considered a stimulant that facilitated work, but had come to be associated with moments of rest and relaxation: a shift that had been made possible because 'coffee is felt to be not so much a substance as a circumstance.'<sup>95</sup>

Yet, as this article has shown, the relationship between 'substance' and 'circumstance' is more complex than Barthes' formulation allows. In order for the 'circumstances' surrounding coffee to change, the coffee had to change too. When coffee became a mass consumer good during the mid-twentieth century, divergent 'quasi-national' coffee styles developed across Europe. In France, for example, the adoption of the *cafetière* as the preferred form of brewing apparatus coincided with the cultural shift that Barthes detected.

The success of the coffee shop and the spread of Italian-style coffee throughout the continent at the end of the twentieth century can similarly only be understood in relation to each other. The contrast between drinking coffee prepared according to the collective 'national style' at home or in the workplace, and consuming Italian-style coffee beverages within the setting of the coffee shop, endowed the latter act with sufficient expressive potential that it could be used by consumers in the production of self. This is the underlying answer to the question 'Why Espresso?'

### Acknowledgements

My thanks to the two anonymous reviewers and particularly, Klaus Nathaus, for their comments and suggestions during the preparation of this article.

### Funding

Some of the research for this article was funded by a grant from the ESRC/AHRC Cultures of Consumption programme (RES-154-25-0015).

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