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Quality and inequality: Taste, value, and power in the third wave coffee market

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Quality and Inequality

Taste, Value, and Power in the Third Wave Coffee Market

Edward F. Fischer



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Abstract

Based on a case study of the burgeoning high-end (“Third Wave”) coffee market in the United States, this discussion paper examines value creation and capital accumulation in an age of neoliberal globalization. Drawing on sociological and economic theories of value, as well as perspectives on world systems and late capitalist accumulation, this paper proposes a framework in which the importance Marx ascribed to control over the material means of production has become eclipsed by control over the means of symbolic production in extracting surplus value through global trade. It shows how roasters, baristas, and marketers have created a new lexicon of quality for coffee, one tied to narratives of provenance and exclusivity that creates much of the value added in the coffee trade. This disadvantages smallholding coffee farmers who are heavily invested in land and the material means of production but lack the social and cultural capital to benefit from the surplus value created through symbolic production. It also perpetuates classic dependency patterns of global capital accumulation.

Keywords: coffee, Guatemala, values, inequality, means of production

Zusammenfassung

Dieser Beitrag untersucht anhand einer Fallstudie über den boomenden US-Markt für hochpreisigen Spezialitätenkaffee („Third-Wave“-Kaffee), wie Wertbildung und Kapitalakkumulation im Zeitalter der neoliberalen Globalisierung geschehen. Er entwickelt einen Bezugsrahmen, der aufzeigt, dass eine Kontrolle über die materiellen Produktionsmittel nicht mehr jene Bedeutung hat, die Marx ihr beimaß. Wird Mehrwert durch globalen Handel generiert, gewinnt vielmehr eine Kontrolle über die Mittel zur Erzeugung symbolischer Produktqualitäten an Bedeutung. Das Paper zieht Werttheorien aus der Soziologie und der Ökonomie ebenso heran wie Sichtweisen zur Weltsystemtheorie und zur kapitalistischen Akkumulation aus der jüngeren Zeit. Es beschreibt, wie Kaffeeröster, Baristas und Marketingfachleute ein neues Kaffeelexikon entwickelt haben, in dem die Qualität eines Kaffees, die einen Großteil des Mehrwerts im Kaffeehandel hervorbringt, mit Narrativen zu seiner Herkunft und Exklusivität verknüpft wird. Dies benachteiligt Kaffee-Kleinbauern, die zwar viel in Grund und Boden sowie in materielle Produktionsmittel investiert haben, jedoch nicht über das soziale und kulturelle Kapital verfügen, um von dem ökonomischen Mehrwert zu profitieren, der durch die Erzeugung symbolischer Produktqualitäten entsteht. Darüber hinaus lässt es die aus globaler Kapitalakkumulation erwachsenen traditionellen Abhängigkeitsmuster fortbestehen.

Schlagwörter: Kaffee, Guatemala, Werte, Ungleichheit, Produktionsmittel

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Quality and Inequality: Taste, Value, and Power in the Third Wave Coffee Market

1 Introduction

Walking into Barista Parlor, a coffee shop in a rapidly gentrifying section of Nashville, Tennessee, there is a palpable hip vibe (Figure 1). Frequently appearing on lists of the U.S.'s best coffee venues, and housed in a former transmission repair shop, the atmosphere is distinctly artisanal, projecting a sense of simple, honest quality. *Esquire* magazine praises it as “authentic,” and, indeed, everything is local, from the reclaimed wood tables to the denim aprons and homemade pop-tarts. Everything, of course, except the coffee itself. But the deep authenticity of branding creates a warm glow around the carefully curated coffees on the menu, extending the sense of an artisanal connection to farmers in faraway places, presumably likewise committed to the art (if not artifice) of quality coffee.

The coffees on offer at Barista are all single-origin beans coming from particular (and named) farms, set apart from one another by geography (not just Indonesia, Rwanda, or Guatemala, but particular regions within countries), altitude (many cognoscenti use altitude as a quick marker of overall quality), and tasting descriptions that draw on an expanding cupping vocabulary (a newly released flavor wheel ranges from rubber and petroleum through clove and peanuts to coconut, cherry, and pomegranate). For each of the six coffees on the Barista menu, the farm of origin and the varietal are noted, along with tasting notes and a recommended brewing style (e.g., Chemex or a V60 pour over). Prices range from \$4.00 to \$7.50 a cup.

The tastes of the Barista consumers – and, even more importantly, of the roaster and baristas and their tastemaker peers at Stumptown, Intelligentsia, La Colombe, Counter Culture, and the other “Third Wave” coffee pioneers – have serious consequences for folks in Colombia, Yemen, Vietnam, and the other tropical countries that produce coffee. Some 25 million people around the world make their living from coffee, many of them smallholding producers in places like highland Guatemala, the focus of my field research. This coffee is mostly consumed in the Global North, particularly the U.S. and Europe, although in 2016 Brazil became the world’s largest consumer of coffee by volume and Japan, China, and other parts of Asia have seen the most rapid growth in recent years.

Thanks to Bart Victor, with whom I conceived of and conducted the fieldwork reported herein and extensively discussed the argument I make; and to Linda Asturias, who organized the surveys and focus groups in Guatemala. Thanks also to Bill Hempstead, Bradley Wilson, Tatiana Paz, Chris Ayers, and Jens Beckert. A special thanks to Karoline Krenn and Simone Schiller-Merkens for their critical comments on a draft version that significantly strengthen the argument presented here. Funding for this research was provided by Vanderbilt University.

Figure 1 Barista Parlor



The rarefied price of high-end coffee (retailing for \$ 50 per kilo and up), and the bulk of its surplus economic value, is created through the artful translation of qualities and connotations across symbolic and material arenas of valuation. Producing these rare coffees requires certain material conditions (soil, rainfall, altitude, and other elements of terroir as well as specific varieties and processing techniques), and coffee farmers (like many farmers around the world) highly value control over their land and means of production as a form of security in an unstable world.

Farmers may control the material means of production and may even be blessed with the auspicious geographic and climatic endowments to grow high-end coffee. But it is control over the means of producing *meaning* (through cultural and symbolic values) where the pecuniary surplus value is added in this assemblage. David Graeber (2013) observes that real power comes not from accumulating value but from defining what constitutes value, setting the terms of the game. In the case of coffee, smallholding farmers control terroir in the gritty materiality of dirt and land, and thus the ability to produce a certain quality, but the real economic power lies with those who define quality, the coffee aficionados and Third Wave marketeers who orchestrate the symbolic and social means of producing what Jens Beckert (2016) terms “imaginative value.” With tastemakers in the Global North constantly chasing new and ever more exotic flavors, farmers in tropical coffee growing regions of the world find themselves at an impossible

disadvantage in making decisions for planting and harvests four to five years down the road. Under these conditions, the one who controls the means of symbolic production is able to extract the most surplus material value.

2 Coffee and values

I begin below by outlining the theoretical context for my proposal, a framework in which the importance Marx ascribed to control over the material means of production has become eclipsed by control over the means of *symbolic* production and the channels of distribution. I bring into conversation two lines of inquiry: The anthropology and sociology of values shows how symbolic valences are related to capital accumulation, and the political economy of early twenty-first century capitalism shows how unequal distributions of wealth persist in an era of disintermediation and global flows.

An anthropological approach to political economy pays close attention to contexts, at the level of local culture as well as global structure, and the subsequent two sections provide the context for this case study. The coffee trade (while big business) still largely operates as it did a hundred years ago, based on relationships that carry the beans from harvest to retail, and this paper will focus on the case of Guatemala to illustrate the larger history of coffee commercialization.

We then turn to consumption and detail how the means of symbolic production work to create quality norms through cupping protocols, the lexicon of taste promoted by the Specialty Coffee Association of America (SCAA), and in venues such as *Roast* magazine. Experts emphasize that quality is strictly about what is “in the cup” – they say that hype and PR does not matter in a blind cupping because the quality is either there or not. All very upfront and meritocratic, it would seem. But who adjudicates that quality? The coffee world’s notion of “quality” strives for solidity and objectivity, with tasting certifications, multi-judge panels, and other metrics imbued with a pseudo-scientific legitimacy. A key function of this elaborate apparatus is to obscure that it is a social artifice, a shared aesthetic valuation regime shot through with economic interest and power relations.

Focusing on the new “Third Wave” retail sector, we examine how tastes for high-end coffees are created by roasters and retailers in Nashville (and by extension Portland and Tokyo, Amsterdam and Shanghai, and other coffee hotspots) through creative improvisation that calls on (and, in so doing, reinforces) emergent standards for measuring coffee quality. These actors also imagine a certain sort of production artisanry at the start of the value chain; in turn, we find growers imagining the desires of the consumers for whom their harvest is destined. We found that Maya farmers highly value control over the material means of production, for both deeply held cultural reasons and as a rational move in a market that values terroir.

Looking at social capital and access to markets, we report on a study comparing “objective” quality to prices paid for coffees. The data show that the farm gate price depends more on the size of the farm and the social capital of the farmer than on blind cupping scores. In this market, the real economic power rests with the ability to define the terms of symbolic value and to translate those symbolic values across the commodity chain.

These examples show that economic power largely rests with control over the means of symbolic production in the Global North, with roasters and retailers educating consumers about coffee quality and managing the symbolic capital in a way that pushes risks back onto producers. Wilson et al. (2012) find that the move toward high quality in coffee exacerbates uneven development in coffee growing areas of Central America. This study supports that hypothesis, showing that while smallholding producers have experienced a boom, they are excluded from the highest value parts of the market because they lack the social capital that could provide access to channels of distribution.

Capital accumulation and the means of symbolic production

Values

The very word holds a telling ambiguity, referring at once to the moral values that orient conceptions of what is most important in life and to the crassly precise dollars-and-cents material values that underwrite capitalist markets. While moral values concerned with the good and the proper may appear more subjective, symbolic, and socially constructed, the seeming objectivity of economic values rests on a whole range of cultural and ideological assumptions about the world and the scale and measure of “value” (Sayer 2011; Stark 2009).

Marx distinguished use-value (an object’s material utility, its primordial source of worth) from exchange value (what someone is willing to pay for it as a commodity, abstracted from the social labor that produced it). He argued that exchange value, untethered from use-value, can take on fantastical dimensions of imagination in fetishizing commodities. Jean Baudrillard (1998), James Carrier and Daniel Miller (1998), and others have shown that in late twentieth-century consumer markets, symbolic values (the meanings attached to goods through branding or more spontaneous cultural and social and artistic associations) came to overshadow material use-values, creating a semiotic system of positional values (infused with power and subject to manipulation) that both reflects and helps construct consumers’ identities and desires.

Use-values have become intertwined with, and increasingly eclipsed by, symbolic values in determining exchange value in a wide swath of turn-of-the-millennium capitalism. For many Third Wave coffee consumers, they are not only drinking a quality cup of coffee, but also buying into (in their own idiosyncratic ways) a vague ethic of artisanal

quality and authenticity and a connection to a distant Other. On the other side of the equation, the stakes are higher for Maya farmers in Guatemala growing coffee; the risks they take can be catastrophic. But even here, most farmers say that coffee is about more than just making money; it is also linked to their increasingly globalized hopes and dreams for a better future for themselves and their children.

Such different value regimes produce different sorts of capital accumulation. David Graeber points to the multiple and overlapping arenas of valuation that exist simultaneously in people's lives, each acting as its own "imaginary totality" (see also Sayer 2011; Stark 2009). These involve use and exchange values, but are most productive in the domains Kockelman (2016) distinguishes between semantic value (meanings) and deontic value (morals). Hirokazu Miyazaki (2006) calls our attention to the constitutive role of hope in global capitalism, and Arjun Appadurai (2013) shows that the role of imagination and aspiration are crucial to understanding different regimes of value (see also Fischer 2006; 2014). Bringing these lines of inquiry into the conversation, Jens Beckert introduces the concept of "imaginative value," when "a good functions as a link between subject and her desired but intangible ideals" (2016, 195). In this realm, value derives from "imaginative performance," the culturally contextualized act of imagining the future.

What I term the "means of symbolic production" refers to the capacity to add economic value to a good (virtual or material) by enhancing its non-material values (through, for example, accompanying narratives of solidarity, exclusivity, or cosmopolitanism; or by reference to esoteric measures of quality). This involves not creating physical structures in the world so much as ideational structures in the mind. Means of symbolic production are conceptually linked to, but apart from, the material means of production (the tools and machinery, the physical objects needed to produce things). The means of symbolic production are more ephemeral and elusive, dealing with imaginative rather than material potential. They involve trend-setters, cool-hunters, thought-leaders, media conglomerates, maverick bloggers, social networks, the idiosyncratic improvisation of daily life, the serendipity of encounters with people and ideas, and the viscous structures that channel our desires.

Classic world system models posit that capitalism perpetuates dependency and underdevelopment in primary product producing countries of the Global South by concentrating capital accumulation (accrued through control over the means of material production, the ability to transform raw materials into commodities) in core economies. Historically, as markets for goods from the tropics grew from the sixteenth century onward, capital accumulation was concentrated in the manufacturing and industrial economies of Western Europe (and later North America), fueling their continued expansion. Capital-intensive technological innovations and other feedback mechanisms built into the system then acted to restrict capital accumulation to core regions while "developing underdevelopment" in the periphery in order to ensure a continued cheap supply of goods and labor (Cardoso and Faletto 1967; Frank 1967; Luxemburg 1913; Wallerstein 1974; 1979).

The decentralized patterns of production characteristic of turn of the twenty-first century capitalism, however, substantially alter this structure of dependent capital accumulation. In the neoliberal era of lowering tariff barriers and falling communication and transportation costs, globalized commodity chains have become the norm and not the exception. One example among many: in the 1960s, about 95 percent of clothes sold in the U.S. were made there, and today 98 percent of clothing is imported. As core areas have focused investment in the service and information sectors, manufacturing and industrial and agricultural production shifted to peripheral regions (Collier and Ong 2005; Friedman 1994; Harvey 1989; Lash and Urry 1987). In some ways this turns classic world systems and dependency theory on its head, with production in the periphery but capital accumulation still in the core. We might call this a neo-dependency phase of the world system.

Controlling the means of production was at the heart of the distribution of power in a classic world system marked by core and periphery. But now it is not the *material* means of production, but the *symbolic* means of production that allows for the greatest value extraction in post-industrial consumer markets.

The coffee value chain

The coffee trade neatly illustrates new forms of accumulation in global capitalism and new cultural valuations in the trend toward high-end and artisanal foodstuffs. Coffee goes through a number of steps between farm and cup, from cooperatives and wet mills through exporters and importers to roasters and cafes, each taking a share of the profits. Most of the value added comes at the consumer end of the chain, particularly roasting and brewing.

Coffee's unique place in the history of global commodities exemplifies relations between Global South and Global North: a poster child for harsh and exploitative labor as well as the catalyst for the fair trade movement. In the early days (the latter nineteenth and most of the twentieth centuries), it was a classic case of world system dependency: countries in the tropics (the periphery, today often referred to as the Global South) producing a raw commodity for sale to the "core" countries of the Global North, with most of the surplus value obtained remaining concentrated in the core (making available more capital for technological investment, reinforcing the divide).

Today, coffee is widely cited as one of the world's most traded commodities, in volume if not value, and it is estimated that around 25 million people worldwide make their living at some point on the coffee supply chain. While benefitting from the lower costs of communication and transportation in this globalized era, the coffee trade is still largely organized around networks of personal relations, from farmers to mills to exporters to roasters and coffee shops and retailers along a supply chain that looks like this: grower → cooperative/intermediary → wet mill → dry mill/exporter → importer → roaster → retail.

The prices along this value chain are anchored by the market price importers pay exporters for hundredweights of green beans. That global metric is known as the C Price, the New York coffee futures contract price for quality washed arabicas.¹ These contracts are for container loads of exchange-grade green beans from nineteen countries of origin for delivery to one of eight licensed warehouses in the United States and Europe (New York, New Orleans, Houston, Bremen, Hamburg, Antwerp, Miami, and Barcelona). In the case of commodity coffee, large buyers (Nestlé, Kraft, Jacobs Douwe Egberts, and a handful of others) dominate the undifferentiated commodity grade market.²

There is a parallel supply chain for the smaller specialty and Third Wave coffee markets, where the unique qualities of different regions, altitudes, and growers are important to maintain; here, personal relationships and short- and medium-term contracts are crucial to the trade. Even a player as big as Starbucks still sends buyers to trudge around the Guatemalan countryside, maintaining ties to growers under contract and seeking out new supplies. Daviron and Ponte (2005) identify a market paradox of coffee in the transition from First and Second Wave to Third Wave. They show that demand growth is not in the bulk commodity market that most farmers grow for, but in the high-end market, where scarcity can raise this process to extreme levels.

Third Wave coffees are almost all washed arabicas grown at high altitudes (1,400–2,000 meters above sea level, or “masl”) to produce a deep, concentrated flavor, with notes ranging from dark berries and chocolate to citrus. Quality washed arabicas need to be processed almost immediately after harvesting. Harvesting is done by hand, a painstaking process to ensure that only ripe, red berries are picked. On large plantations, workers are paid by the pound, and their already meager wages are docked for too many unripe fruits. The ripe fruit (“cherry”) is wet milled to remove the pulp, and then goes through two phases of drying, reaching the “parchment” stage, with the two halves of the bean covered in a thin skin. Parchment is then sold to dry mills, often associated with exporters, who remove the parchment and bag the green beans for shipment.

Most smallholding coffee farmers cannot do their own wet milling. It requires a large capital investment, and the volume of all but the largest smallholders cannot justify it. As a result, more than half of smallholding producers in Guatemala belong to a cooperative that runs a wet mill, and a majority of the rest say that they would like to join one. The smallest scale independent coffee farmers in Guatemala have to sell their harvest as cherry (which will stay good for less than 48 hours) to intermediaries, known disdainfully as coyotes, who simply transport it in pickup trucks to the local mill to sell for a significant markup.

1 Two main species of coffee are cultivated today, arabica (*Coffea arabica*) and robusta (*Coffea canephora*). As the name implies, robusta is a heartier plant and produces larger quantities at lower, more temperate altitudes. Its flavor, however, is considered inferior, more bitter and acidic.

2 Starting in the 1940s with the Inter-American Coffee Agreement and expanding with the 1962 International Coffee Agreement (ICA), the coffee trade was highly regulated until 1989 when the ICA was broken down in a triumph of neoliberal deregulation.

The most successful Third Wave producers (mostly medium-sized operations) enter national and international competitions, such as the Cup of Excellence, and will auction the lots with high cupping scores for significant premiums. There are a few dozen import houses in the U.S. (and several more in London, Amsterdam, Hamburg, and a few other key sites) that do at least some trade in Third Wave coffees, termed “micro-lot” coffee in the business. They will buy at these auctions and work with exporters in producer countries to identify desired lots and try and match-make them with roasters. Larger coffee shops and small chains often try to establish direct ties to farmers, even making trips to visit farms. But only the largest of these can manage to import directly, and the majority make their direct ties through or alongside an importer.

The Third Wave and Guatemalan coffee

Referring to the three waves of coffee consumption, the First Wave was a mid-twentieth century phenomenon marked by the spread of commodity coffee and the rise of Folgers, Maxwell House, Jacobs (Germany), and Douwe Egberts (Netherlands), and all the other familiar grocery store brands. The First Wave was about assuring quality (against the adulteration of bulk coffee with chicory and other substances). With the market matured by the 1960s, these brands began to compete mainly on price, to the detriment of quality: think of the bland uniformity represented by all those tin pound cans of coffee on the grocery shelf. Perhaps it is no coincidence that coffee consumption in the U.S. peaked (in terms of cups consumed) in the early 1960s.

The 1960s also saw the rise of a new vanguard of U.S. coffee purveyors, Second Wave pioneers such as Peet’s in San Francisco and Zabar’s in New York. The Second Wave saw its apogee in the spread of Starbucks across the country and the world. Anthropologist William Roseberry (1996) describes this Second Wave consumption as a shift from coffee as the beverage of capitalism (coffee and sugar serving as great proletarian hunger killers, as Sidney Mintz (1985) has pointed out) to being a beverage of postmodernity (an outlet for performing identity and difference). As part of this trend, the second wave also saw a rising concern with ethical and environmental conditions of production through Fair Trade and organic coffees (Jaffee 2007; Reichman 2011; B. Wilson 2010; 2013).

The trends Roseberry observed have accelerated in the first part of the twenty-first century with the rise of Third Wave coffee and its concern with provenance and quality (and facilitated by the demise of the International Coffee Agreement). New strategies of commodification and de-commodification converge with greater consumer concern with geographic and moral provenance (see Fischer 2014). The Third Wave concern with “quality in the cup” overshadows appeals to social justice in the conditions of production. This is a post-justice infatuation with artisanry and authenticity that simply assumes that such expensive coffee will be produced in ethical conditions.

Virtually all Third Wave coffees are micro-lots from single estates. While overwhelmingly of the species arabica, Third Wave coffees encompass a range of different subspecies varieties. A growing number of exclusive lots of green coffee have sold for more than \$100 a pound,³ a ceiling first broken in 2007 by the storied Gesha varietal from Hacienda La Esmeralda in Panama. In 2012, a Mocha (an heirloom varietal originally from Yemen) grown by the Finca El Injerto in Guatemala sold for \$500.50 a pound, still a record. (Meanwhile, the New York C price fluctuated between \$1.13 and \$1.46 over the first 8 months of 2016.)

Guatemala is ground zero for Third Wave coffee. This is due in part to its unique geographic and climatic endowments. High altitude coffees tend to command higher premiums, and Guatemala's volcanic slopes and varied microclimates create a range of subtle flavors. Such endowments are necessary but insufficient to explain the rise of Guatemalan Third Wave coffees. It was also due to visionaries such as Bill Hempstead, who, as president and a director of the Guatemalan Coffee Association (Anacafé), promoted the branding of regional cup profiles in the 1990s, leading to the flourishing of single estate and micro-lot coffees. Following Hempstead's vision, Anacafé divided Guatemala into eight regions, each with its own cupping profile, providing a model for Third Wave coffee's concern with provenance and qualities of terroir.

The rise of this market has been a boon for producers in the Maya majority highlands of western Guatemala (Fischer 2014). Sarah Lyon (2010, 6), in her study of smallholding coffee producers in the town of San Juan La Laguna, reports that locals refer to the new coffee production as “the bomb’ that exploded in the community, bringing income that enabled families to end their seasonal migration to lowland plantations, build cement-block houses, and educate their children.” Looking a little closer, we see that the rewards are not evenly distributed. For the big winners, success comes not just from microclimate and harvesting techniques, but in their store of social and cultural capital that allows them to bridge domains of value to facilitate economic arbitrage. The real power still rests in the Global North, with roasters and retailers educating consumers about coffee quality and managing the symbolic capital in a way that pushes risks back onto producers (even of quality coffee) and making them vulnerable to fickle taste and trends.

High altitude and single estate beans can now command extraordinary prices based on their cupping profile and score on a 0–100 scale. I am often asked if these coffees are worth the prices they command. It depends on how we value them. In high-end markets that move toward singularity (limited edition prints, that particular Bordeaux vintage, the 2012 El Injerto Mocha), normal market forces of supply and demand do not apply. That leads us to consider what constitutes value for such non-commodities and how we put a price on it (Karpik 2010). Objective quality (by established tasting standards and conventions) and market scarcity play an important role, but just as

3 Coffee is still most commonly traded in pounds rather than kilos; the benchmark New York C process is for hundredweights (100 pound bags) of quality washed arabica.

important, and probably more, are the symbolic values at play: the relative positioning of conspicuous consumption; the imagined, personal relationship with a producer; and underwriting it all, the cultural and market shift among the global affluent toward artisanal and singular products. The language used to talk about Third Wave coffee borrows heavily from fine wine, ideas of terroir, and the artisanal food movement. The narratives about provenance and taste are key to its value.

Creating taste and value

For virtually all who try them, it is clear that micro-lot Third Wave coffees are different from run-of-the-mill joe. A whole range of subtle flavors comes out in the clean, smooth, balanced profile of a fine coffee. There is an objective, material distinction: they simply taste different. But how does different become “better”? The values and labels we assign to tastes are learned. They become codified among a cognoscenti, and then, to the extent that they become stylish, are learned by others.⁴ At the very least, a common vocabulary gets established, one permeated with class and cultural associations.

It is in these spaces that the means of symbolic production operate. Rather than producing a physical object, something of material use, they produce perceptions and mental frameworks of value. They are able to create and capture surplus value by shaping perceptions. In a coffee cupping course, one first learns the basic protocol (e.g., let the grounds form a crust for 3 minutes, break it, and inhale to judge the fragrance/aroma score) and etiquette (slurping and spitting are encouraged). Then, for novices, one is coached to identify and label certain flavors, gently guided in the “right” direction. When I first participated in a cupping, I would tentatively identify a flavor (pomegranate?) and the master cupper might nudge me in a particular direction (perhaps it is actually raspberry ... what do you think?). I might well taste a distinct flavor in the cup, but be unable to articulate it until prompted with the “proper” vocabulary. In this way, one becomes trained to look out for certain flavors, and to internalize this class- and culture-inflected way of categorizing coffee.

We see this at work in the Coffee Quality Institute’s “Q Grader” program that certifies coffee cuppers. Successful applicants have to pass five “triangulation cuppings” to differentiate a total of 90 distinct coffees. An article in *Roast* (an influential Third Wave magazine) observes that with triangulated cupping (identifying the odd cup out) even a novice will quickly learn to distinguish coffees from different world regions and countries: “a Latin American coffee is going to taste different than an African coffee,” and tasting them side by side clearly reveals the differences (Allen 2010, 58).

4 See Terrio (2000) on chocolate and Ocejo (2014) on the role of servers and bartenders as cultural intermediaries, helping link provenance and backstory to taste.

The trade group for specialty and Third Wave coffee, the Specialty Coffee Association of America (SCAA), goes to great lengths to bolster the scientific credentials of its classifications and tasting protocols. The greater the apparent objectivity of measurement, the better able these systems of valuation are at imparting the power of authenticity, the idea that they are discovering something rather than constructing it. While there are a few different cupping (“organoleptic evaluation”) protocols, the SCAA’s 100 point scale is the industry standard:

- 90–100: Outstanding (generally premium micro-lot Third Wave coffees)
- 85–89.99: Excellent (micro-lot coffees and some premium Second Wave)
- 80–84.99: Very Good (Specialty grade, i.e. Second Wave)
- 75–79.99: Usual Good Quality (UGQ) – decent commodity coffee.

Scores above 80 mark “specialty” coffee (such as would be served at Starbucks), and scores in the high 80s and above 90 place beans in the rarefied world of Third Wave coffees that retail for \$5, \$6, \$7 a cup and more than \$25 a pound (454 g) for roasted beans (although usually sold in 12 oz [340 g], or increasingly 6 oz [170 g], packages both to stress the exclusivity of limited supply and to make the price tag slightly less eye-popping).

The SCAA rubric aggregates scores on ten attributes: (1) fragrance/aroma, (2) flavor, (3) aftertaste, (4) acidity, (5) body, (6) balance, (7) uniformity, (8) clean cup, (9) sweetness, and then what is described as a more subjective cupper’s holistic impression, (10) overall. Each of the ten categories is rated 0–10, although in practice it is almost always in the 6 to 9.75 range. On scoring forms, there is a separate category for defects, which subtract points. Scores of some or all of these categories are often represented on a spider graph.

Another major player in the effort to codify coffee quality is the Cup of Excellence initiative. Acting as a market-friendly alternative to Fair Trade, the goal of CoE (as it is known in the business) is to reward farmers for producing high quality coffee, improving their income through a quality rather than a charity premium. CoE competitions have taken cupping standardization to another level. In CoE competitions, each coffee will be blindly evaluated 5 times by different cuppers. Only coffees that get consistently high scores advance in the competition; each country will have 25–35 ranking winning coffees (out of hundreds of entrants), and these are sold at a live internet auction. Prices for the top ten coffees in the 2016 Guatemala competition ranged from \$10 to \$53 a pound (and the cupping scores from 89 to 92). Bradley Wilson and colleagues (2012) examine the factors that contributed most to Cup of Excellence wins in Central America over a number of years. They found that the quality score (0–100) is by far the most important attribute, followed by the number of descriptors (e.g., grapefruit, maple syrup, smooth) used by judges, and then altitude (the higher the altitude, the better the coffee is assumed to be).⁵

5 Some think that altitude is fetishized. And I have visited enough farms to know that precise al-

“Orange blossom, white tea, syrupy”
“Tangerine, brown sugar, lime”
“Caramel, nutty, round”

The language used to talk about Third Wave coffee is inspired by the wine world, with exotic and evocative descriptors such as those above, and even the 0–100 scale recalls Robert Parker’s scores. To justify prices, roasters and retailers rely on efforts to codify taste through numerical metrics and the objectification of flavors. In a more poetic vein, in 2015 the SCAA unveiled a new flavor chart. Working with researchers at the University of California, Davis and Kansas State (see Sage 2016), the Coffee Taster’s Flavor Wheel (Figure 2) offers a lexicon of coffee terms coming from “the frontiers of sensory science methods and analyses.” They describe the process using technical language (“an Agglomerative Hierarchical Cluster [AHC] analysis was performed on the results from the sorting exercise to group the flavor attributes into different categories [or clusters] represented visually by a dendrogram”).

The flavor wheel ranges from Chamomile, Rose, and Jasmine to Vegetative and Herblike to Petroleum, Skunk, and Pipe Tobacco. But even with a common vocabulary, there can be idiosyncratic differences and variability in judging intensity. Thus the need for common reference points to ground the scale. In order to calibrate the flavor wheel categories on a 0–15 scale of intensity, World Coffee Research (2016) published the first-ever Sensory Lexicon for coffee. To illustrate the attempt at arbitrary precision, here is the entry for “green” as both flavor and aroma:

GREEN: An aromatic characteristic of fresh, plant-based material. Attributes may include leafy, viney, unripe, grassy, and peapod.

REFERENCE: Parsley water

AROMA: 9.0

Rinse and chop 25 grams of fresh parsley. Add 300 milliliters of water. Let sit for 15 minutes. Filter out the parsley. Serve 1 tablespoon of the water in a medium snifter. Cover.

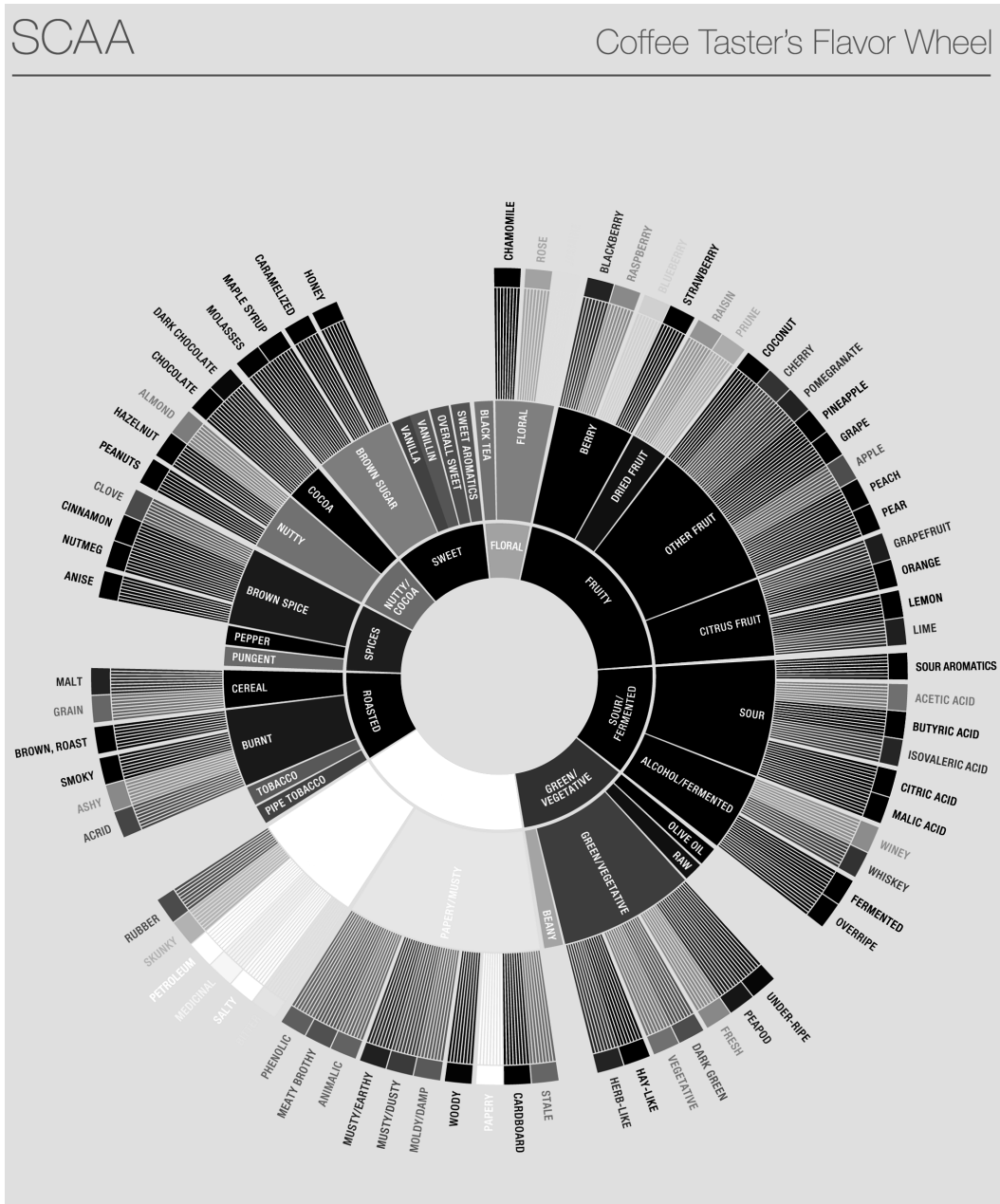
FLAVOR: 6.0

Rinse and chop 25 grams of fresh parsley. Add 300 milliliters of water. Let sit for 15 minutes. Filter out the parsley. Serve 2 teaspoons of the water in a 1-ounce cup. Cover with a plastic lid.

The SCAA, CoE, and others pioneering the Third Wave coffee market have made a concerted effort to establish new taste criteria and to ground those value judgments in objective, scientific measurements. This is the way that the means of symbolic production can work to make “different” into “better”: employing science (agronomy, geography,

titude distinctions often do not mean much on the ground, filling bags. Nonetheless, the theory is that coffee is stressed more at high altitudes, and so produces more complex sugars and more pronounced spicy or fruity elements.

Figure 2 SCAA Flavor Wheel (under Creative Commons 4.0 license)



climatology) to create categories of “objective” differences, upon which are built the pseudo-objective cupping profiles, and values are assigned to these profiles on a scale that corresponds to price.

Third Wave retail

A professional coffee class, working through and with the SCAA, Cup of Excellence, Anacafé, *Roast* magazine, and of all the importers and exporters and roasters involved in the Third Wave, developed a vocabulary linked to a system of values and valuations with corresponding numeric scales and metrics. They help define the tastes of Third Wave coffee through work that is largely behind the scenes, insiders talking to other insiders. This gets translated into the consumer market by Third Wave coffee shops and internet operations. Portland's Stumptown, Chicago's Intelligentsia, and Durham's Counter Culture are leading this expansion, but many others are growing (including San Francisco's Blue Bottle, Philadelphia's La Columbe, Washington's Compass Coffee, and Santa Cruz-based Verve, among others). As a sign of the growth potential, German investment firm JAB has bought both Stumptown and Intelligentsia (along with Second Wave pioneers Peet's, Caribou, and Dutch-German market leader Jacobs Douwe Egberts), and Starbucks has opened a Third Wave "Reserve Roastery and Tasting Room" in Seattle.

It is here (in the coffee shops and online stores) that the means of symbolic production are deployed, with particular attributes highlighted and communicated. While there are a growing number of serious coffee aficionados, they still only constitute a fraction of a typical shop's business. So Third Wave retailers have to educate consumers and create demand for a product that has long been priced as a bulk commodity. What kind of value does a \$7 cup of coffee bring as opposed to a \$1 cup?

As with Nashville's Barista Parlor, most Third Wave stores stress the artisanal quality of their coffee and the virtues of a particular terroir. Paige West, in a study following New Guinea coffee from source to cup, describes how coffee shops play on various sorts of symbolic values to "infuse the coffee beans with a kind of veneer of meaning that connects the beans to the ways the consumers imagine themselves" (2012, 213).

What one is likely to see on a coffee menu in a Third Wave shop is a list of coffees with particular attributes highlighted, including:

1. Provenance: The geographic origin (country, region, farm, and for the most exclusive, particular parts of a farm) is crucial to categorizing a particular coffee. This includes not only the ecology and agronomy of difference, but also the symbolic values of place. Cup of Excellence-certified coffees (not just the winners) from Guatemala get an average \$3.33/lb premium because of their country of origin (Wilson et al. 2102).
2. Altitude: Meters above sea level (masl) is used as a quick shorthand for quality, with higher altitudes assumed to be better. It is said that high altitudes produce denser beans and a sweeter and more intense flavor. Strictly Hard Bean (SGB) coffees, most specialty coffees, and all Third Wave coffees are grown above 1,400 masl, up to the maximum altitude of around 2,000 masl.

3. Varietal: The overwhelming majority of Third Wave coffee is *Coffea arabica*; the other main coffee species, *Coffea robusta*, is widely considered inferior in terms of sensory quality (although some coffee mavericks are starting to extoll its virtues). Among the arabicas there are a number of varieties (technically, “cultivars”), each with distinctive characteristics (see Table 1).

Table 1 Select *Coffea arabica* cultivars and their key attributes

Mocha (named for Yemeni port)	Bright acidity, complex; wine/fruit flavors; very small bean
Gesha (named for Ethiopian village)	Stumptown’s website describes it as “like a Szechuan peppercorn, or the Sun Ra Arkestra, complex and otherworldly.”
Bourbon	Sweet, smooth, with wine and chocolate flavors; classic coffee taste
Catuai	Hybrid plant developed in Brazil in the 1940s
Caturra	A bourbon-like profile but with a higher yield; bred in Brazil in the 1930s
Pacamara	Hybrid of bourbon with some of the citrus and floral of maragogipe
Maragogipe	Discovered in Brazil; pronounced citrus and floral flavors; large beans

4. Processing method: Washed arabicas have long been the standard-bearer for quality (with the coffee fruit de-pulped and washed immediately following harvest). In contrast, “natural” processed (letting the cherries rot off the beans under direct sunlight) is associated with low-end bulk coffee from Brazil and elsewhere. Recently there has been a revalorization of natural processed beans and the fruity flavor fermentation gives; and there is a new category of “honey” coffee that is semi-washed (with cherries allowed to decompose slightly before washing).

5. Taste descriptors: Cupping notes and taste descriptors are key to priming the customer and helping them select a coffee to their liking. Descriptors include flavors from the coffee wheel as well as a wider range of sensory adjectives (smooth, creamy, complex, deep, clear, clean, etc.). Bradley Wilson and colleagues (2012) show that the absolute number of descriptors used significantly influences the prices of coffees in Cup of Excellence.

6. Brewing method: Particular coffees are often paired with recommended brewing methods, most a version of the simple three-minute pour over (which is what it sounds like: slowly pouring 95 °C water over ground coffee in a filter), including Chemex, V60, and Bee House. While these low-tech methods are assumed to produce the cleanest cup, there is also increasing experimentation with high tech methods that produce different flavors, from Modbar systems to nitrous infused cold brews. It can even be the good old-fashioned French Press: I recently saw a sign proclaiming that “the Sumatra is good for French Press with its syrupy, deep flavor.”

Baristas in coffee shops act as cultural middlemen, at once seeking to meet their customer’s wishes while also pushing them to try new things, to identify, and then hopefully desire, new flavors. According to baristas, one of the most common customer requests is for a coffee with “low acidity” (along with “bold” and “clean” cup profiles). In fact, acidity is a key component of all coffee profiles, and a quality coffee can have high acidity. What the customers likely mean is “balance” more than acidity, a point on which they can be gently educated by a barista. In this way, the dialectic encounters between desire

and profit (the consumer having an idea about their preferences that is honed and given form and direction by the expert) act as part of the means of symbolic production.

In the early days of Third Wave marketing, educating the consumer focused on broad cup profiles but also included a pronounced emphasis on a romanticized provenance, often including farmers' names and details about their lives. Paige West (2012, 25) shows how images of producer "poverty and primitivity" are used to add value to coffee, with consumers imagining that they are contributing to farmers' dreams of a better life. She writes that "with certified and single-origin coffees the images used to sell the products are also manipulated to make consumers feel as if they are making other people's lives better through the act of buying."

Such narratives bolster the de-commodified image of micro-lot coffees, personalizing the backstory. The Counter Culture website recently (2016) featured coffee from Finca El Puente in Honduras (12 oz. for \$17.25 plus shipping). The description began: "We met Moisés Herrera and Marysabel Caballero – the couple that runs Finca El Puente – in 2005. Since then, they have become like family and inspire us every year." (The coffee, a washed arabica grown at 1,400–1,653 meters, is described as a "mostly Catuai-variety lot lush with notes of Concord grape accented by a brown-sugar sweetness that finishes with a crisp, toasted nut character.") Such provenance and a sense of personal connection to a producer is a key element of de-commodified value.

Similarly, Blue Bottle recently offered a "limited release" edition of a Honduras Guaimaca Miravalle coffee. The price was \$12.00 – for six ounces. The farmer, Don Miro, is described as exceptionally devoted to his coffee; harvested from high altitude cloud forest land, "his mature coffee trees produce vibrant red fruit with dense seeds" that take longer to dry. Blue Bottle says the resulting quality is worth the extra cost: Its "fragrant tea-like acidity" is punctuated by "orange blossoms and a syrupy mouthfeel."

As Third Wave retailing is starting to mature, we see slightly less emphasis on the narrative details of provenance and more on the sensory properties ("the cup") and the art of blending and roasting. The stores themselves have become more sleek and modern, sometimes eschewing Wi-Fi and often hiding the milk and sugar – conveying a notion that this is a temple to the coffee qua coffee. At Compass Coffee in Washington, DC, they have on offer several single estate coffees, as one would expect, but they also prominently display various house blends, each with their own unique flavor profile. Blue Bottle, Counter Culture, and other retailers are likewise offering more blends, proudly touting their cup profiles with descriptors as appealing as those for single origin beans.

The stress on blends may correspond to the pace of a roaster's expansion plans (as blends offer much more flexibility in supply chains). In addition to starting to de-stress single origin, many Third Wave coffee shops are chasing new flavors not only in the cup, but through technology and barista artisanry, with herbal infusions, coffee cocktails, nitrous infusions, cold brews, and so on. All of this diminishes the importance of terroir and thus the power of farmers.

Maya farmers and perceptions of quality

While the vocabulary and metrics of quality are being developed by Third Wave roasters, baristas, and the SCAA and its corporate and academic partners, coffee farmers in places like Guatemala are developing their own understandings of quality and the market. For Mayan farmers, coffee fits into local worlds of valuation both material and moral.

Coffee production in Guatemala has undergone a dramatic transformation since the late 1990s. The move among Northern consumers toward Third Wave coffees has driven demand for the quality Strictly Hard Bean coffees grown above 1,400 m. As a result, many of the large, lower-altitude plantations long synonymous with the German coffee oligarchy in Guatemala have abandoned production. Tens of thousands of Maya smallholding farmers in the highlands have begun growing coffee to fill this market niche. Most of these small producers live in very modest circumstances with limited resources and opportunities. Yet, as they describe it, coffee represents an opportunity in a context of few opportunities, an imperfect means to a marginally better life (Fischer and Victor 2014).

Bart Victor and I have been conducting ethnographic and market research with smallholding coffee farmers in the Maya highlands of Guatemala since 2011.⁶ With Linda Asturias, we conducted a major survey with in-depth interviews and focus groups with farmers in 2011 (n=82) and again in 2014 (n=315) in ten communities. In addition, we interviewed all of the past presidents of Anacafé, the leaders of large cooperatives, and the heads of several export firms.

In our sample, 75 percent of respondents were male (average age: 42), 25 percent female (average age: 48). In terms of ethnic identification, 76 percent were Mayan (most speaking a Mayan language) and the rest *ladino* (non-indigenous Spanish speaking). Households averaged 5.8 members, 3 of whom worked in the family coffee fields. Mean years of education was 2.9 for male and 4.8 for female respondents.

In our surveys and ethnographic interviews, we found that these coffee farmers overwhelmingly saw coffee as a net positive in their lives and in the vitality of their communities. They lamented the fluctuating prices, the danger from crop diseases and rainfall patterns, and how little of the final value came to them. Still, the booming market in recent years for high-altitude coffee has pushed prices up and resulted in an influx of new money to the region.

The income coffee brings is important, but it is generally talked about in instrumental terms, linked to larger life projects and moral orientations. They talk about wanting to be able to send their kids to school, maybe even on to high school in one of the larger towns, so that they can have more opportunities than farming can provide. They talk

6 This research was a thoroughly collaborative endeavor with Victor, and his perspectives permeate this paper.

Figure 3 Coffee farmer



of buying a pickup, a way to cut out the middleman but also a powerful symbol of self-determination. These aspirations are grounded in a practical ethics that extends beyond economic calculation (Fischer and Benson 2006; Figure 3).

Most of the farmers we interviewed highly value control over their land and the other means of production. They see such control as a source of security in an unstable world. In this context, coffee has provided a way to maintain control over land, and perhaps even expand holdings. It is also a way to earn extra cash income while maintaining the familiar rhythms of an agricultural lifestyle, which, as tiresome as it can be, is also deeply meaningful for many, linking generations cosmologically as well as materially (Fischer 2001).

Among farmers in our sample, there was clearly a realization of the importance of “quality,” but for most, quality is predicated on the judgments of intermediaries who assess quality through the cosmetic appearance of cherry or parchment. While there is strong interest in knowing more about the people who drink their coffee, growers’ understandings of Third Wave consumers is vague at best. In our 2014 surveys, 59 percent of farmers reported that they did not know where their coffee went after they sold it to their cooperative or to a middleman. Almost 32 percent reported having “some knowledge,” but that was generally just piecemeal impressions filtered through the cooperative.

A profitable understanding of quality is developing among the most savvy and successful smallholding producers. Raymundo is a 64-year-old Jakaltek Maya speaker from the Huehuetenango region of Guatemala, an area that has seen an economic boom over the last decade due to coffee, remittances, and drug smuggling (a sizable percentage of the cocaine that enters the U.S. comes through Huehuetenango). He says that he sells his coffee to German buyers who are looking for “real quality”: “they want our coffee because they only buy the best coffee; they don’t want a coffee that is acidic in the stomach, they want a balanced and healthy coffee, this is the kind of coffee they want over there.” He goes on to proudly report that they use his name and tell customers where his farm is in the marketing materials.

Armando, a 42-year-old farmer with a second-grade education, is proud of his skill to produce a coffee with a special flavor: “our coffees have a taste of chocolate and molasses – it is a taste that the foreigners like, especially the Italians.” In what would be seen as an affront to the single-origin purity sought by many Third Wave aficionados, Armando says that he surreptitiously mixes varieties to produce a distinctive flavor.

Miguel, another farmer, reports that “you also have to be earnest and sincere when talking about your coffee to these buyers.” In the end, he says, “the big businesses still have all the power, they come in and tell us what the price for coffee is, they set the terms, like it or not.”

The retail de-commodification of coffee (in terms of the market for micro-lots, the importance of provenance, the connection with farmers) has shifted some power (in terms of value extraction) to smallholding producers in places like Guatemala (who are fortunate enough to control land at the right altitudes and micro-climates). This is the promise of globalizing disintermediation: independent farmers taking the risks of planting, waiting, harvesting, selling, and in this case, making some money based on their competitive advantages. Li (2014) observes that for many smallholding farmers, the attraction of a “fair market,” one where rewards are based on hard work, is compelling.

Most of the farmers we talked to would like more direct connections with the market; they realize they do not fully understand the desires at the far end, but would like to have closer connections to importers if not roasters and consumers. Farmers appreciate coffee and see it as an important source of cash income to supplement (or in some cases replace) their subsistence crops. They take pride in their ability to grow it well and in Guatemala’s international reputation for production quality coffees. Building on long-standing Maya and agrarian traditions, most see a virtue in earning a living from the land and producing something of quality (an almost Physiocratic view of the economy). But the farmers are not the consumers (this is a disarticulated market, to borrow a phrase from de Janvry 1981), and selling coffee while not consuming it is alienating in key ways. This is seen in the fact that exceedingly few of Guatemala’s Third Wave coffee farmers have learned how to “properly” taste coffee.

Instead, we find two subjectivities linked to the same commodity chain: the dual imaginations of Third Wave-drinking aficionados imagining distant producers and the Maya farmers in Huehuetenango, Guatemala imagining the drinkers of their coffee while seeking a better life for their own families in difficult circumstances. There is a lot of room for misunderstandings here, but also for surplus value extraction in translating across the seemingly incommensurate symbolic domains. Farmers are seeking to hold on to (and expand) land holdings, while tastemakers and consumers are chasing new and ever more exotic flavors.

Social capital and access to markets

The modest power shift toward coffee producers in places like highland Guatemala – propelled by consumer market turns toward high-altitude, micro-lot beans and facilitated by the disintermediation of “direct trade” relations – is tenuous.⁷ The most significant value added is being made closer to the consumer by the tastemakers who control the means of symbolic production and have the social and cultural capital to access distribution channels. In fact, looking at sales prices of award-winning coffees in Central America, Wilson et al. (2012) found that the size of a farm had a strong positive correlation with Cup of Excellence score and price. Larger farms do better because they have more space and capital to experiment with different varieties and growing conditions – and they have substantial social capital advantages.⁸ Yet, it is an image of exclusivity and rarity as much as “objective” cupping scores that drives price: Wilson and his colleagues also note that there is a negative correlation between price and the volume of coffee offered in the CoE auction (as too much on offer dilutes the sense of exclusivity).

The biggest beneficiaries of this high-altitude coffee boom have been the middle-sized producers, the smaller of the big producers. These tend to be non-indigenous-owned farms that have been in business for generations and whose owners have inherited and built up the social capital needed to present an attractive image of production and quality to the North American or European market.⁹ These farmers tend to be better educated, often with some university education, speak at least a little English, and be early adopters of the internet and cell phones and other technologies of commerce. They

7 This disintermediation is symbolic as much as logistic. Coffee is still largely traded much as it was a century ago, with lots of middlemen handling a trade built on personal relations and an opaque market structure. Even “direct trade” involves a number of exporters and importers.

8 Note that size is relative: big First Wave producers had thousands, sometimes tens of thousands of hectares; for the CoE entries from Guatemala in the Wilson et al. (2012) study, the average size was 92.21 hectares; and in our sample of smallholding producers, the average coffee cultivation farm size was 2.15 hectares.

9 The Japanese, South Korean, and Chinese markets are rapidly growing, but producer orientations and imaginations are still primarily oriented toward the U.S. and, to a lesser extent, Germany and the rest of Europe.

grow very high quality coffee, but just as important, they have the social capital that allows them to engage the export market and translate across value regimes.

In 2015, Bart Victor and I conducted an experiment to test the relative importance of objective quality metrics versus the social and symbolic capital that go into high-end Guatemalan coffees.¹⁰ We identified several Cup of Excellence certified farms in Huehuetenango, Guatemala, a remote region known for its exceptionally high-quality coffees. We mapped these farms and the many smallholder coffee plots between them. The CoE farms were all owned by non-indigenous farmers, a number of whom were college educated and familiar with the U.S. market. In contrast, the smallholders were all Maya, spoke the Mam language, and had low levels of education and literacy. Many of the smallholders supply seasonal day labor to the CoE plantations.

In an opportunistic sample, we bought green coffee beans from 15 smallholders on lands in the vicinity of the CoE farms, all at roughly the same altitude and similar micro-climatic conditions. We found that the CoE certified farms receive a significant premium (even if they did not win a particular competition), getting several times normal farm gate prices. (Demand significantly exceeded supply in the Third Wave market in 2015, keeping prices high.) At the time of our survey, CoE farms were averaging \$4 a pound for their regular coffees, while the small producers were selling theirs for an average of \$1.25 a pound.

We had the sampled coffees roasted and blind cupped by Anacafé. Over 75 percent of them were specialty-grade coffees, scoring 80 and above, and almost 50 percent scored above 85, clearly in the category of Third Wave coffee. These results show that, based on the objective quality criteria for the trade, the smallholders' coffee is worth several times what they are receiving for it. Yet, they only receive a fraction of that price. Part of the lower farm gate price for smallholders is due to the larger transaction costs involved in buying small lots from many producers. But this can only account for a fraction of the price differential we found.

Coffees produced by the CoE certified farms justify their premiums on the basis of their material quality. But the objective quality alone is insufficient; garnering significant premiums also requires the savvy to tell a good story (that consumers want to hear) and the connections to be able to tell that story to importers and consumers. That is to say that success also depends on the social and cultural capital needed to translate material and symbolic values across arenas of valuation.

10 Thanks to Will McCollum and Mac Muir, who helped design and carried out this study.

3 Discussion

Third Wave coffee pioneers are dramatically changing the landscape of the coffee market in the United States, and increasingly throughout the high-income world, much as Starbucks did for the Second Wave. Third Wave coffees have also dramatically altered the ethno-economic landscape in Guatemala, with production moving into the Maya-dominated highlands regions and away from the lower-altitude plantations of the country's German-descended coffee oligarchy. These are two very different value regimes.

Bill Hempstead of Anacafé describes what happened in Guatemala as the country's largest transfer of wealth and property from the ruling elite to the long-marginalized indigenous majority. The impact was uneven, for sure, depending on the endowments of altitude and microclimate. It was not the poorest of the poor but a peasant middle class that had the resources to benefit most. And yet our surveys in 2011 and 2014 of smallholding farmers and their workers show that they overwhelmingly see coffee as a positive addition to their income earning strategies. They are under no illusions that this new (and currently booming) market is a panacea for all their problems but see it as an important source of income in a landscape of few opportunities. Crucially, it also allows them to maintain control over their land and means of production and to keep up elements of an agrarian lifestyle important to their identity. Coffee not only represents cash, but also symbolizes hopes and dreams for the future.

Coffee growers, even the smallholders, may control the material means of production to grow what the market has recently determined is the highest quality coffee (washed arabicas scoring above 85 on the standardized distinctions of cupping scores): they have the altitude, the micro-climate, access to varieties, and the knowledge (tacit as well as explicit) of how to grow quality coffee. What they lack is the translational ability, the cultural capital and social connections that the more successful Third Wave producers have. The inequality of power here is not based on differential access to productive capital and informational asymmetries that keep power and capital accumulating in the Global North; rather, it is based on control over the symbolic means of production and the social capital that allows for market access.

This brings us to a key point: as traders have known since time immemorial, value can be accumulated through translating meanings as well as transporting goods across domains of valuation. The gaps between Graeber's "arenas of valuation" (different contexts and social spheres with their own totalizing ideals and metrics of value) create opportunities for arbitrage and accumulation through translating one sort of capital (social, for example) into another (e.g., financial). Patrick Aspers (2006) examines the role of "contextual knowledge" in the value chains of contemporary fashion. He argues that garment manufacturers in developing countries are at a disadvantage, even though they control the means of production, because they do not have the contextual knowledge of what the customer wants. Stark (2009, 15) writes that entrepreneurs often create value through an "ability to keep multiple evaluative principles in play and to exploit the resulting friction of their interplay."

Anna Tsing (2015) provides a compelling example in her analysis of a matsutake mushroom value chain. She shows that success in the matsutake trade rests on social and economic translational abilities and particular forms of cosmopolitan cultural capital – the ability to link the desires of the Hmong picker in Oregon to the scales of the Tokyo mushroom grader who will assign a ¥ value. She concludes that amassing wealth in the current capitalist world system is not just about rationalizing labor, but rather is based on “acts of translation across varied social and political spaces” (62).¹¹

These studies show how capitalism can extract value from producers’ varied notions of what they desire, the differences between arenas of valuation. From this perspective, there is no single capitalist logic running throughout the global system of values; rather, there are varied logics and lived realities that shape each other, and economic value is extracted by arbitraging these logics and value systems.¹² Graeber concludes that “the ultimate stakes of political life tend to lie precisely in negotiating how these values and arenas will ultimately relate to one another” (2013, 226). Here it is useful to recall Pierre Bourdieu’s (1977; 1984) expansive notion of different sorts of capital, recognizing not just traditional economic and financial capital, but also social, cultural, and other forms of symbolic capital.

David Harvey (1989) describes “flexible accumulation” as a more nimble form of chasing surplus value, one not tied down by the physical infrastructure of industrial production (see also Friedman 1994; Lash and Urry 1987). Roseberry (1996) points out that the post-Fordist supply chain, based around flexible accumulation, was being enacted in the Second Wave coffee market. He notes the proliferation of vaguely worked “styles” of coffee (such as Kona or Blue Mountain) replacing actual and concrete geographic designations. This allowed importers and roasters and retailers to shift sites of production quickly and at will while keeping the patina of provenance and quality. Such flexible production disadvantages producers and workers and the far end of the commodity chain.

Robert Frank (2000) notes that a growing portion of consumer goods are now positional, meaning that their value derives largely from exclusivity and how much value others place on them. Objects of Thorsten Veblen’s conspicuous consumption are the classic cases: the value of that handbag or sports car depends on how much other people want it. In an apparent anomaly for rational-choice maximizing models, positional value appears exogenous to any particular transaction (Beckert 2016). With such goods, it is important to recall that the market does not just fulfill needs, it creates them (Galbraith 1958; Miller 1998).

11 The matsutake trade is a sort of “status market,” defined by Aspers and Beckert as one lacking “a scale of value that is independent of its actors” (2011, 18).

12 See Nahoum (2013) for a case study of native Amazonian peoples selling native plants to cosmetics companies, and the varied ways spiritual and material domains of value come into contact and conflict in different market settings.

The economic importance of positional goods illustrates a larger trend in varied markets toward the de-commodification of goods. Commodities, by their nature, are interchangeable – for Marx commodities are reducible to labor value, and for financiers they are alike enough to be bought and sold sight unseen. Igor Kopytoff's (1986) work suggests we see the commodity as an ideal type that we find at one end of a spectrum that ranges to the unique and singular. From this perspective, we may see the marketing of positional goods as an effort to de-commodify (i. e., make more singular): for example, “this is not just any coffee, but a very particular and special variety.”

Thus, we find a neo-dependency global economy, with production taking place in the periphery and consumption in the core. At the same time, high-end markets are chasing authenticity and singularity in a symbolic landscape based on imagined values (and relative positional status). This results in a situation where control over the material means of production is no longer crucial to accumulation. What matters more in this context is control over the channels of distribution and the means of symbolic production.

4 Conclusions: Power, capital, and the symbolic means of production

I began this paper by recounting Marx's distinction between use-values and exchange values and his observation that exchange value (price) may become unhinged from an item's actual material utility, allowing for the extraction of surplus value. In turn-of-the-millennium consumer capitalism, symbolic value now mediates (and sometimes eclipses) the relationship between use-value and price.¹³

The rapid rise of the Third Wave coffee market in recent years shows the importance of symbolic values in extracting economic surplus in early twentieth-century global capitalism. This paper has stressed the importance of symbolic means of production. We have seen how roasters and coffee shops, the SCAA and its corporate partners, and coffee trendsetters around the world have built a system of coffee metrics and descriptors that anchors valuations and price; how this symbolic valuation machine is deployed alongside the cultural capital provided by narratives of romanticized provenance and self-improvement; and how apparatuses such as the SCAA Flavor Wheel and the accompanying Lexicon go to great lengths to ground their symbolic value creation in metrics. In this way, the means of symbolic production is grounded in seemingly objective criteria.

13 With symbolic values, it takes much longer to reach a point of diminishing marginal utility than with material use-values, opening the door to creating the very needs and demands that then get satisfied. Given the sophistication of marketing, the consumption of symbolic values and the formation of identities also make it easier to subvert good intentions (Carrier 2012; Moberg 2014; Wilson 2013).

Controlling material means of production is no longer key to extracting surplus value: this is true of much of the outsourcing value chain as well as the freelance economy. Uber drivers may own their cars, and technically be their own bosses, but the real money is being made by controlling the means of distribution. Foxcon has done very well in assembling iPhones and other products in Shenzhen, but the “designed in California” label nods to the intellectual property and branding that extracts the most surplus value. Cook and Crang (1996) point to the “double commodity fetish” of foodstuffs: an ignorance of the origin and conditions of production of the desired items combined with geographical “lore” about these origins (see also Cook 1994).

Indeed, while this paper focused on the case of coffee, the model I propose reflects a broader trend in capitalist dynamics. It is applicable to the extent that market power has come to rest more and more with intangible assets and the means of symbolic production. There is a growing divide between the knowledge/symbolic realms and the material economy, and it is exacerbating inequalities in developed as well as developing countries. For example, intangible property plays an increasing role in surplus value extraction; witness the rise of intellectual property rights concerns in international law and trade agreements over recent decades.

In the Third Wave coffee trade, the bulk of accumulation of surplus value takes place in the European and North American core, allowed not so much by control over productive capital as control over the means of symbolic (cultural, social) production. There is differential access to markets based on social capital (language, family, and social connections); roasters and retailers can quickly change the terms of quality; and the symbolic/cultural capital stays concentrated in the North while producers such as Maya coffee farmers take most of the material risks.

Leading figures in the specialty coffee world emphasize that the high prices for Third Wave beans is all about what is “in the cup.” The turn to a supposed meritocracy of quality was largely embraced by farmers large and small alike across Guatemala, as they were willing to link their rewards to hard work. And it went well in the heady early days of the expanding market. The notion of “quality” as promoted by Barista Parlor, *Roast* magazine, Anacafé, the SCAA, and the many other players in the Third Wave movement strives for solidity and objectivity, with tasting certifications and blind cuppings. Yet tastes in coffee are always changing, especially in this market where the objective is to sell a de-commoditized product, something singular, unusual, and unique.

To justify their price, specialty coffees have to carry symbolic values that distinguish them from other coffees – partly through cupping descriptors and numerical scores, partly by the lore that builds up around particular areas and farms. Paige West shows how importers distinguish particular coffees from the others on offer in terms of cup profile (“good acidity,” “chocolate and nutty”), and at the same time how they must be prepared to “make an alternative seem commensurable” in case a substitute is needed (2012, 204). One Hamburg importer describes the art of uniquely differentiating lots

(e.g., Papua New Guinea's distinct fruity flavor from the bit of fermentation that happens getting beans from remote highland plots to wet mills) while also having to have backups with similar characteristics (this Panamanian has a similar profile ...). They work hard to singularize the product, but also to leave the flexibility to substitute another coffee when needed, undermining the producer's market power. As Roseberry (1996) observed with Second Wave coffees, the post-Fordist approach to coffee sourcing disadvantages labor in new ways, as styles of coffee can be moved around the world, chasing low prices, just like outsourced manufacturing (see also Cook and Crang 1996; Daviron and Ponte 2005).

Beckert, Rössel, and Schenk (2014) show that price differences in wines are mostly unrelated to production costs and to blind tasting evaluations; they are, rather, built on symbolic values. For example, winemakers seek to distance themselves from the industrial realities of production and present an image of artisanal craftsmanship. Consumers, in turn, must learn the relevant cultural and social fields of values, the vocabulary to appreciate fine wine. We have seen similar moves – using cultural capital and an air of exclusivity to extract financial gains – in a number of beverages, notably with scotch, bourbon, and a growing range of artisanal spirits. This is a movement of de-commodification and singularization (Kopytoff 1986) toward the long tail of artisanal rarity and away from cookie-cutter commodities.

A big part of the economic value added in the Third Wave coffee market comes from the symbolic values produced through provenance narratives, often featuring farmers' personal histories, as told by roasters and baristas. Steinberg, Taylor, and Moran-Taylor (2014) show how idealized images of the Maya are used in the marketing of Guatemalan coffees, and West (2012) examines how cultural images have been used to add symbolic value through associating coffee with Papua New Guinea native authenticity. Customers at the coffee shops West studied are mostly still learning about coffee quality, and they vaguely associate it with their imaginations of places like Papua New Guinea or Guatemala. The social narrative of exotic Otherness that traders attach would seem much less fungible than flavor descriptions, but it can become a blur of poverty and primitivity for the distant consumer. For many, these are all minor variations on “native.”

Meanwhile, Third Wave tastemakers are busy teaching the market what to value, and constantly seeking out new markers of distinction for their brands and their coffees. Over the last couple of years there has been a move away from the deep chocolate flavors of bourbon and toward the more citrus and floral notes of maragogipe beans and the bright complexities of mocha and gesha varieties. Roasters are seeking the ever more exotic, as it is oddity and novelty that is most valued. One roaster we interviewed was bubbling with pride as he described a new flavor he had just uncovered in a particular roast (bubblegum!). As I write this, I received a promotional email for a Red Gesha offered by Stumptown with “juicy notes of watermelon and rose water with a hard candy sweetness.” It will be difficult for Maya farmers to keep up with market tastes that shift so quickly, especially when they have to make decisions about what varieties to plant four or five years out.

Thus, we find coffee aficionados chasing the most unusual flavors, the most unique characteristics in the cup. While apparently rewarding objective “quality,” these fickle preferences structurally disadvantage smallholding Maya coffee farmers in Guatemala and other producers around the world. Such producers suffer from a dearth of the social capital that could help them translate their material endowments, technical expertise, and cultural capital into economic gain. Market setting power rests with those controlling the symbolic and imaginative means of production (and who are situated much closer to the consumption end of the supply chain). As a result, capital accumulation continues to follow classic world system patterns of concentration in the developed (and now post-industrial) core.

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