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**Is the International Coffee Market Coming Home to Ethiopia?**

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# **Is the International Coffee Market Coming Home to Ethiopia?**

**by**

**James Richard Francis Jeffrey, B.A.**

## **Report**

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## **Abstract**

### **Is the International Coffee Market Coming Home to Ethiopia?**

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This MA Report explains the impact coffee cooperatives are having on the Ethiopian coffee industry. It analyses how the current multi-billion dollar global coffee industry began in what remains one of the world's poorest countries, where arabica coffee was discovered sometime before the sixth century. It explains the emergence of coffee cooperatives historically, as well as their present role offering an alternative to the country's previous reliance on the assistance of Western nongovernmental organizations with their possible negative impact, including arguments they enforced a dependency on Ethiopia that impeded the country's development. In discussing coffee buyers and coffee consumption, the report focuses on America, although the same points made apply to the vast majority of Western countries.

The report investigates whether cooperatives offer a business model sufficient to achieve self-sustainability for Ethiopian coffee farmers, and discusses how the interaction between and among cooperatives, unions, the Ethiopian government, and specialty coffee buyers in America is enabling Ethiopian coffee to increase its leverage on the

international coffee market, generating essential income for the struggling Ethiopian economy.

The report focuses on the following areas: the connection between poverty and linkage to markets; how coffee travels from smallholding farmers in Ethiopia to be sold in American cities like Austin, Texas; the emergence of certification systems like Fair Trade to protect farmers and ensure they receive a fair price for their produce, as well as the chain of commerce that Fair Trade is part of; the quality and characteristics of Ethiopian coffee; and whether cooperatives and unions can remain true to the original goals of serving their farmer members—not turning into purely profit-orientated businesses.

While this report focuses on Ethiopia, it dissects and debates economic trends that usually affect developing nations producing coffee. It explores the logistics and ethics of prices paid in the West for coffee from developing countries like Ethiopia.

The report ultimately aims to enlighten readers so they're able to make an ethical purchase of a good quality coffee, while aware of the myriad factors and trends affecting the international coffee market.

## Table of Contents

|                            |    |
|----------------------------|----|
| List of Illustrations..... | ix |
| Text .....                 | 1  |
| Bibliography .....         | 41 |
| Vita .....                 | 42 |



## **List of Illustrations**

|                                                                                    |    |
|------------------------------------------------------------------------------------|----|
| Illustration 1: Coffee farmers displaying coffee tree .....                        | 2  |
| Illustration 2: Typical Ethiopian home found in Borena province's countryside .... | 4  |
| Illustration 3: Map of Ethiopia.....                                               | 6  |
| Illustration 4: Ripe berries on coffee trees ready for harvest.....                | 7  |
| Illustration 5: Busy market.....                                                   | 9  |
| Illustration 6: Coffee beans laid out in the sun to dry .....                      | 11 |
| Illustration 7: Poor coffee farmer.....                                            | 12 |
| Illustration 8: New school building financed by Fair Trade social premiums.....    | 16 |
| Illustration 9: Laborers carry sacks of coffee to cooperative warehouse.....       | 18 |
| Illustration 10: Union officials inspecting wet processed coffee beans.....        | 20 |
| Illustration 11: Coffee cupping at SCFCU.....                                      | 22 |
| Illustration 12: Wet station in Sidama province .....                              | 24 |
| Illustration 13: Camel herders.....                                                | 27 |
| Illustration 14: JICA forest grown coffee .....                                    | 28 |
| Illustration 15: Excited children.....                                             | 30 |
| Illustration 16: Girl selling onions at Jimma market .....                         | 35 |
| Illustration 17: Ethiopian man and boy in Tigray province.....                     | 38 |
| Illustration 18: Traditional Ethiopian coffee ceremony .....                       | 40 |

## **Is the International Coffee Market Coming Home to Ethiopia?**

“Every time you spend money, you’re casting a vote for the kind of world you want.” Anna Lappé.

The crisp air of the Abaya Highlands softened the glare of midday sun as it beat down on Southern Ethiopia’s Borena province, approximately 550 kilometers south of Ethiopia’s capital, Addis Ababa. Here, amid rolling, green hills that mark the epicenter of Yirgacheffe coffee production, one of the country’s most popular exported coffees, four farmers sat in the shade of an empty coffee warehouse, telling me why they felt confident 2011’s crop would be a good one after 2010’s harvest had disappointed due to a lack of rain and excess heat.

Ayele Gemedé, the eldest of the group, said the harvest in 2009 had been a bad one, also. “It was the rains that were excessive,” he said, “and washed away much of the coffee, meaning the yield was low.”

Coffee farmers across the world have historically been at the mercy of capricious weather systems. But these four farmers felt confident due to 2011’s more stable weather and their membership of the Kelaitu Hase Gola coffee farmers’ cooperative, established in 2004, that enables them to better withstand yearly fluctuations that once caused havoc and ruined lives.

They wore what appeared to be standard Ethiopian coffee farmer’s rig: baseball cap, scruffy trousers and T-shirts—all except Gemedé, who was dressed in a collared shirt and blazer that made him look rather smart. In addition to the anticipated bumper harvest, their smiles accompanied stories about how membership of the cooperative had transformed their lives.

“Previously I was not happy with low prices for lots of hard work, along with lots of expenses,” Mengesha Wocho said of farming before joining the cooperative. “Now there are better prices and we’re getting benefits.” He remembered that his father and grandfather lived in extreme poverty and endured a hard lifestyle, compared with his improved situation.

“My home has totally changed,” he said. “My personal health has improved. My income has improved. I’m expanding my farmland.” He added with a smile and hand gestures that he can now send his 10 children to school.



Illustration 1: Coffee farmers Mengesha Wocho and Ayele Gemede in the Abaya Highlands display a coffee tree’s unripe cherry that will turn into a precious commodity come harvest time in December. Photo by James Jeffrey.

The famers said their cooperative provided access to new markets, including the Fair Trade market that utilizes certificates to confirm transparency and mutually

beneficial partnerships between consumers and producers. The market has become increasingly popular in the West due to consumers' concerns about the inequities of trade. The farmers added that the cooperative has also facilitated more stable and increased prices for coffee—enabling farmers to withstand the fluctuations of a fickle world market—and coordinated the use of increased revenue to build vital facilities benefiting the local community. Before I left, they insisted on showing me a thicket of young and healthy coffee trees they expected to bear their precious fruit by the year's end, in four months' time.

“Even if there is a bad harvest, we can still have a bright future, get additional income, and improve our lives,” Wocho said.

The farmers' experience offers a window on Ethiopia's coffee industry, which is undergoing significant change. In 2010, coffee provided 60 percent (\$840 million) of Ethiopia's \$2.7 billion of export revenue, making coffee the country's primary export and largest generator of foreign capital. Ethiopia is regarded as the birthplace of coffee. Yet the lucrative global coffee phenomenon has in recent years largely bypassed Ethiopia—today one of the world's poorest countries, despite Western nongovernmental organizations' intervention for over forty years, which some argue contributed to the country's problems. In spite of the fact that, in the opinion of some coffee experts, Ethiopia produces the world's best coffee, many American grocery stores' shelves and cafes not only don't sell it, but consumers are often unaware it exists. The blame is mainly due to Ethiopia's ingrained lack of marketing, a result of decades of political turmoil that have undermined the necessary infrastructure to develop what might have been Ethiopia's ticket to self-sustainability.



Illustration 2: A typical Ethiopian home found in the countryside of the Borena province. Photo by James Jeffrey.

Today, however, there is new hope as the cooperative business model replaces the country's former reliance on Western NGOs. Coffee cooperatives have not only emerged, but have federated into the four Coffee Unions of Ethiopia: Sidama, Yirgacheffe, Oromia and Kaffa. The Oromia Coffee Farmers Coffee Union is now the biggest in Ethiopia, with 197 cooperatives representing 194,586 farmers, in contrast to 34 cooperatives with 22,691 members in 1999. Cooperatives have gained critical access to the international coffee market thanks to their representative coffee unions, the Ethiopian government's embrace of coffee's potential, and the espousal of Ethiopian coffee by specialty buyers and roasters in the West. After oil, coffee is the second-most valuable legal commodity exported in the world, accounting for trade worth an estimated \$15.4 billion in 2010,

when some 93.4 million bags were shipped, according to the London based International Coffee Organization.

As a result, coffee farmed in the distant Abaya Highlands of Ethiopia makes its way to the stores of cities like Austin, Texas, after being shipped to America through a buyer who agreed a contract based on the commodity-market price for coffee set by the New York Commodity Exchange. Dollars from this international network of economic interchange are sorely needed by the struggling Ethiopian economy. But it's not clear to customers whether the estimated 2 million Ethiopians involved in the country's coffee industry really benefit from these dollars. Certification systems such as Fair Trade and Rainforest Alliance emerged to assuage consumers' concerns, though some argue certification is an unnecessary expense for cooperatives and more of a sales pitch from American coffee sellers to lure conscientious customers. Also, while coffee unions and cooperatives gain a footing in the international market and increase revenues, what ensures they continue acting on behalf of farmers?

"Ethiopian coffees are still too moderately priced for what they're worth," said Willem Boot, a coffee consultant who has worked with Ethiopian cooperatives since 2004. He talked to me via Skype from Panama, where he was visiting his coffee farm. "Their specialty coffees are just so significantly better than other specialty coffees and are really undersold."



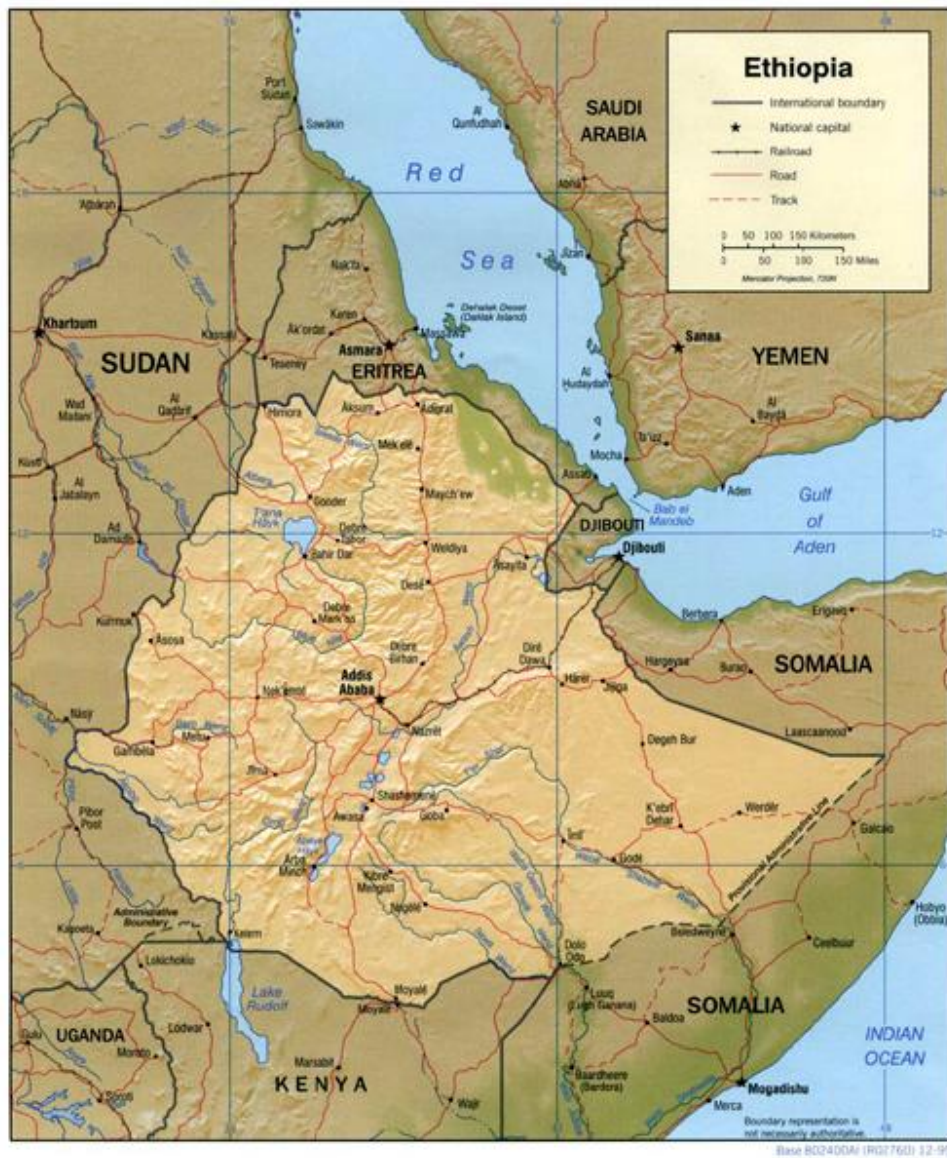


Illustration 3: Map of Ethiopia. Graphic courtesy University of Texas Libraries, Perry-Castañeda Library Map Collection.

Legend has it an Ethiopian shepherd boy discovered coffee sometime around the fifth century—no one knows exactly when. While he tended to his goats in the hills surrounding the present day city of Jimma, he noticed they became extremely excitable

after eating the red berries of a tree he'd never seen before. So he ate the berries—these encase coffee beans and today are called coffee cherry (it's not pluralized)—and experienced a similarly stimulated reaction. Around the sixth century, coffee spread from Ethiopia to Yemen, and in the 16th century traded east as well as northward to Turkey, from where it was exported to Europe during the 17th century, finally making its way during the 18th century to the Americas—becoming truly global.

The global coffee industry has a checkered history, bringing profit to a few and strife to many others—usually those farming the coffee.



Illustration 4: Ripe cherry on coffee trees awaiting December's harvest in the Kaffa province, birthplace of arabica coffee. Photo by James Jeffrey.

The cooperative movement in Ethiopia began in the 1950s, during the reign of Emperor Haile Selassie. It sought to emulate the United States' cooperative movement,



begun by President Franklin D. Roosevelt in the 1930s during the Great Depression, by transforming Ethiopia's farming from subsistence to commercial. After Selassie's suspicious death in 1975, Colonel Mengistu Haile Maryam seized power and created a socialist-inspired state ruled by the ruthless Derg that instructed the army to kill many thousands viewed as troublesome, and forced families collecting a body for burial to pay the cost of the fatal bullet. Cooperatives, as a result, became social organizations to implement the government's decrees—while also becoming increasingly unpopular with member farmers coerced by such policies. The 1991 revolution that ousted Mengistu paved the way for a more democratic Ethiopia and, in turn, for more democratic cooperatives as they adapted to the new Ethiopia as it opened itself and its coffee to the world.

Since I discovered Ethiopia in 2000, living there for six months, I've wrestled with the paradox that much of its untainted beauty and simple appeal stems from its inherent poverty. I love many things about Ethiopia, especially its coffee. The more I explored this potent brew, spending a month during the summer of 2011 visiting Addis Ababa—the logistic hub of its coffee industry—and the southern coffee growing areas, plus two weeks in December of the same year to witness the coffee harvest in the south and west of the country, I realized how coffee represented Ethiopia's strengths and weaknesses: the finest tasting coffee with the lineage to match, yet still unappreciated by the market it created and underutilized by Ethiopia's struggling economy.

Traveling during 2011, it was hard to avoid the conclusion that not much had improved for the average Ethiopian since 2000, but people in the coffee industry told me a different story.



Illustration 5: Ethiopia's economy is dominated by subsistence agriculture. Many of its peoples' livelihoods depend on busy markets like this one in the town of Hayk, 250 kilometers north of Addis Ababa. Photo by James Jeffrey.

In Addis Ababa, a week before traveling south to the Abaya Highlands, I met Haile Gebre, the man known as the father of Ethiopian cooperatives. Sitting on the verandah of his coffee business offices, I drank and talked coffee with Gebre, who with his graying beard, rotund gait, and twinkly eyes—especially when discussing coffee—could make a fine Father Christmas.

“As Ethiopia became a liberal country, it developed a new proclamation for the cooperatives,” Gebre said. “They became democratically free movements—a policy that was articulated by me.”

In 1999 he headed the government's Bureau for Cooperatives and established the first coffee union, OCFCU, to represent the Oromia region's cooperatives. Today farmers belonging to a cooperative meet with its general assembly, whose members are elected by

the same farmers. After hearing their farmers' concerns, a cooperative's general assembly attends its union's annual general assembly to vote on issues. In addition, cooperatives and unions provide infrastructure and economy of scale, enabling farmers to access new markets and withstand price fluctuations that, historically, coffee markets experience due to weather and crop failure affecting supply and demand—enough to ruin a lone coffee farmer.

“The main reason of poverty is trade,” said Tadesse Meskala, who was appointed OCFCU's general manager by Gebre. “It's not because countries are poor in national resources; it's because of the formulation of the trading mechanism that makes us poorer and poorer.”

Initially, farmers sell cherry to cooperatives at local market price, receiving cash in hand. Cooperatives process cherry—using two methods: dry and wet—to remove the outer mucilage surrounding green beans. Dry processing, a traditional method originating in Ethiopia, involves cherry laid in the sun to dry, after which beans are easily removed. Wet processing, conducted at specially built wet stations, stores cherry in vats of water where fermentation loosens outer layers to be washed off.

Processed beans are stored in cooperative warehouses and transported by trucks to Addis Ababa after being sold to one of the unions. Cooperatives divide the net profit from that sale: 30 percent covering their administrative costs, and 70 percent going to farmers as a dividend. The relevant union conducts final processing and negotiates a deal with a buyer like Cooperative Coffees, comprising 24 community-based coffee roasters in the U.S. and Canada.

Unions divide that sale's net profit: 30 percent covering their costs—salaries, equipment, investment, and training courses—with 70 percent going to cooperatives,

which divide that along a 30/70 split, as before, so farmers receive a second dividend.



Illustration 6: After being wet processed to remove the outer mucilage, coffee beans are laid out in the sun to dry while part-time laborers, like this woman in Sidama province, sift the beans so they dry evenly. Photo by James Jeffrey.

Purchased beans are trucked by unions to Djibouti's port for export to America. Cooperative Coffees receives the shipment in New Jersey and trucks it to a member roaster, like Austin's Third Coast Coffee, that roasts and sells the beans.

This process is complicated by the fact Ethiopia lacks a railway—everything is trucked along clogged, slow-going roads—and that since splitting with Eritrea, it remains landlocked. But unions and cooperatives banding together are able to leverage logistic solutions to overcome these problems.

“The main scenario of why farmers are kept in poverty is lack of linkage,” said OCFCU's Meskala, “linkage to markets.”



It doesn't take much imagination to appreciate how such logistic problems are insurmountable for a smallholding farmer working on his own. A few minutes after leaving the four farmers I talked to that afternoon on the hillside in the Abaya Highlands, my Toyota Hilux was bumping along a dirt track as it wound through neighboring hills and thick vegetation when I noticed a patch of dilapidated coffee trees, quite different from the ones the men had shown me earlier. After stopping to have a closer look, a man approached, barefoot, with his clothes hanging in shreds.



Illustration 7: Forty-year-old coffee farmer Shibru Worera with his wife and three of their six children standing among his half-hectare smallholding of coffee trees in the Abaya Highlands of Southern Ethiopia's Borena province. Photo by James Jeffrey.

Forty-year-old Shibru Worera said his trees were almost as old as he was and as a result not productive, compounding the problems he faced in feeding his wife and six

children. Four children had already died. That was incentive enough, he told me, to prompt him to want to join the Kelaitu Hase Gola cooperative.

“I’m looking forward to working with the cooperative,” Worera said. “I hope to have a chance to improve—there are no other opportunities.”

Cooperatives have increased farmer’s revenues by enabling them gain access to the international coffee market. Gebre and Meskala helped open that door when they traveled to U.S. coffee conventions starting in 1998 to demonstrate the quality of cooperatives’ coffees. Gebre said coffee experts remarked that Ethiopian coffee was better than world-renowned Jamaican Blue Mountain, and suggested cooperatives could attain better prices by certifying coffee as organic. Gebre invited organic certifiers to Ethiopia, resulting in Ethiopia’s first certified organic coffee sales. The next step involved attaining Fair Trade status to facilitate greater market access, as well as shoring up prices during a volatile period in the market.

“The price of coffee had fallen very low due to globalization,” Gebre said. “Some farmers were earning below subsistence—existing was very hard.”

There is no universally accepted definition of the Fair Trade movement. It’s most commonly defined as a transparent system of business mutually beneficial to consumers and producers—based on principles like fair wages, environmental sustainability, and respect for cultural identity. It began in 1960s Europe. By 1988, the first Fair Trade certification initiative, Max Havelaar, emerged in the Netherlands, allowing customers and distributors to trace the origin of goods, confirming that products sold benefited producers.

The concept caught on. By 1997, multiple labeling organizations converged in the creation of Fairtrade Labeling Organizations International. Its subsidiary, FLO-Cert, conducted audits of producers and traders to ensure Fair Trade standards were met.

Today, FLO is the largest and most widely recognized Fair Trade labeling system. It's used worldwide apart from the U.S., which uses Fair Trade Certified labeling as part of Fair Trade USA.

FLO stipulates the minimum price per pound of Fair Trade green coffee beans be \$1.60 or the New York Stock Exchange Commodity price, whichever is higher, plus an additional Fair Trade social premium of 20 cents and—if certified organic—an organic premium of 30 cents (combined premiums totaling 50 cents).

Roasters like Austin's Third Coast, however, often pay in excess of that minimum. In July 2011, for example, Cooperative Coffees negotiated on its behalf with OCFCU for a batch of Yirgacheffe coffee at \$3.90 per pound. The Fair Trade price floor at the time was \$2.69—the commodity exchange price being higher—which, with premiums added, took the Fair Trade price to \$3.19. Cooperative Coffees paid 71 cents more per pound than obliged by Fair Trade guidelines. The batch contained 300 bags of coffee, total weight 39,682 pounds. That extra 71 cents per pound equated to \$27,777 above the Fair Trade minimum. Clay Roper, a Third Coast roaster, said that increase recognized the coffee's quality.

Due to flexibility in paying above the Fair Trade minimum, the quality of a buyer's commitment to fair trade can be questioned.

"Starbucks does buy Fair Trade, but it is not reliable and will check the price," SCFCU's Anebo said. "If the price is suitable, it buys the coffee; if the price isn't suitable, then it doesn't buy the coffee." He added when the Fair Trade minimum increased in 2011—resulting from global increases in commodity prices and production costs—the union couldn't sell coffee to Starbucks. He said there are two types of Fair Trade buyer: one like Starbucks that, finding the market suitable—the price being low

enough—buys Fair Trade, the other like small roasters that no matter what the price, buy Fair Trade and absorb cost fluctuations.

Halfway up a steep hillside in Borena province's Bule Hora district—the rocky, dirt track putting Toyota's off-road credentials to the test as I gripped the door handles to steady myself—is a former health clinic constructed by the Kilensa Rasa cooperative in 2006 using Fair Trade premiums, which the government then expanded into the present day health center. It has four nurses and an outreach program covering a population just under 29,000.

"Tuberculosis is still bad," said Ahimed Abdulkadir, one of the nurses, "also, communicable diseases, sexually transmitted diseases, and internal parasites due to a lack of clean water and sanitation."

Whereas the premium from organic certified coffee sales is earmarked for farmers themselves, the social premium from Fair Trade certified coffee goes direct to farmers' cooperatives to facilitate projects benefiting the community: building health clinics, roads, and schools, and installing electricity and potable water distribution points.

During its 10-year history, OCFCU has constructed 15 schools, four clinics, and 56 clean water supply stations, as well as establishing 23 branches of cooperative banks and launching an insurance program for members.

During my travels around Borena province, cooperative officials and farmers alike told me the same positive stories about the impact of premiums. The baseball-capped farmers in its Abaya district told how their cherry, after being processed by the cooperative, was sold as Fair Trade and organic certified Yirgacheffe coffee—with the farmers receiving and benefiting from premiums in addition to original cash payments and two dividend payments.



“We now have a consumer [the international market],” said Mengesha Wocho, “a shop which the cooperative established where we can buy goods, and a school constructed by Fair Trade.”



Illustration 8: A new school building financed by Fair Trade social premiums and built through Kilaso Mekonisa Coffee Farmers Primary Cooperative in Borena province’s Bule Hora district. Photo by James Jeffrey.

Wocho said the cooperative’s committee, after discussing plans with the local community, decided what projects to launch using the cooperative’s capital boosted by premiums—the community still lacked health facilities and potable water. He added that he wasn’t educated, as his parents couldn’t afford it, so he’s happy dividends are used to benefit the community, including those not involved in the cooperative. That way, he said, others might have the opportunities he missed.

In Borena's Abaya district, Beri Muketa told me he began coffee farming as a 15-year-old assisting his father. Now 26, he farms his own land and belongs to the Homa Primary Cooperative, with 725 members.

"Due to the difference in price, now my friends and I have good homes and living conditions," he said. He added that health standards have improved through the clinic the cooperative financed, and his brothers and sister no longer walk to school in the town of Guguan, 47 kilometers away, but attend the Shara high school built locally with cooperative funds.

"We used to sleep on the floor," he said. "Now we have beds."

At the heart of the Fair Trade movement and at the forefront of many coffee consumers' minds is a clear question: Do farmers receive a fair percentage of the price paid for a cup of coffee at their local coffee bar or for a bag of beans at their local supermarket? Dissecting coffee pricing is complicated by the range of activities and costs accrued to produce a cup of Ethiopian coffee in America.

"Farmers farm the coffee cherry, and that is what they are paid for," said SCFCU's Anebo. "But for the cherry to become the coffee in hand, not only are there transport costs, but there is the cost of alchemy that takes cherry and turns it into a green bean for export, which then has to be roasted to be usable to become a cup of coffee."

Matters are further muddled by farmers selling their cherry by kilos that lose half their weight during processing, and an American buyer purchasing the processed product by the pound that loses further weight during the roasting process, before arriving in a cafe or store. That's not to say one shouldn't be concerned about a farmer's stake in the transaction. Rather it's not as simple as a percentage of a coffee cup's price—especially with profit distribution to farmers going through a 30/70 split, twice. Furthermore, Fair

Trade certification and the coffee drinker's musings overlook part-time laborers paid the local currency of 12 Birr (70 cents) for eight hours daily labor during coffee processing: about \$21 for a month's work.



Illustration 9: Part-time laborers carry sacks of sun-dried coffee to the Abela Galuko cooperative warehouse, in Sidama province, before trucking to Addis Ababa for final processing and export to the U.S. Photo by James Jeffrey.

It is feasible, however, to analyze the price differential between the amount of money unions receive for the coffee they sell and the markup price at which roasters sell that coffee. Surrounded by the smells of fresh coffees and accompanied by the coffee grinder's whirl when a customer claimed their preferred choice, Clay Roper explained to me that costs accrued by Third Coast per pound of Yirgacheffe coffee from the July 2011

batch Cooperative Coffees bought from OCFCU (at \$3.90), which Third Coast sold for \$8.74 wholesale.

Initially, Roper said, Third Coast paid \$4.22 per pound to Cooperative Coffees, which included \$3.90 paid to OCFCU plus Cooperative Coffees' costs for shipping from Djibouti to New Jersey, as well as storage and handling costs. On top of \$4.22 add 22 cents for trucking from Jersey to Austin; 63 cents for the 18 percent weight loss during the roasting process; 34 cents towards fuel for roasting; 20 cents to hand pack the coffee in a 5 pound valve-bag for wholesale shipment (including bag cost); 20 cents for distribution costs to retailers; \$2.50 for overhead costs ranging from mortgages and machinery loans to sales commissions, repairs, and rubbish removal; and finally a 4.9 percent profit margin of 43 cents that takes the price to \$8.74. Walk in customers pay \$9 to cover extra costs to keep the store open regular hours.

According to the above figures, the increase from \$3.90 paid to OCFCU to the \$8.74 Third Coast sold that same coffee at appears cost-justified. But such cost analyses aren't provided with certificates on coffee bags or displayed in a cafe—hence, uncertainly can remain about the fairness of costs.

What customers can be confident of with Fair Trade Ethiopian coffee is they're getting what they paid for. If purchasing Ethiopian Sidama arabica coffee, for example, you'll get the characteristics of bright acidity and medium body with spicy and citrus flavors.

"If a coffee is not Fair Trade, you don't know if it has been mixed with others," SCFCU's Anebo said. "A Fair Trade coffee must be what it claims to be and guarantees the flavor."

There are two main strains of coffee in the world: arabica and robusta. The arabica strain—the shepherd boy’s discovery—remained the only coffee type until the end of the 19th century. It grows best at high altitudes, between 3,000 and 6,000 feet, requires a mean annual temperature around 70 Fahrenheit, plenty of rain (70 inches a year), and develops slowly—typically three to four years. It’s a fastidious plant, limiting areas that can grow it successfully to mountainous areas—like Ethiopia—located around the world between the Tropics of Cancer and Capricorn.



Illustration 10: SCFCU’s General Manager Tsegaye Anebo and Deputy General Manager Berhanu Legesse inspect wet processed coffee beans at a wet station in Sidama province. Photo by James Jeffrey.

Discovered in the Belgian Congo in 1898, robusta thrives anywhere from sea level to 3,000 feet, and the tree bears fruit earlier, in its second year, and produces more:



all of which are advantageous. The downside: robusta's taste is harsh, flat, and bitter in comparison with arabica's, which benefits from the challenges of elevation—lower oxygen levels, colder nights—forcing trees to grow slowly, leading to denser beans producing vibrant, acidic flavors sought as indispensable to a great cup of coffee.

Pendergast's "Uncommon Grounds" recalled how, in 1912, the New York Coffee Exchange appointed a three-man committee to study robusta. They concluded it "a practically worthless bean," banning it from the exchange. Yet price wars among American coffee producers led to cheaper robusta beans gradually infiltrating the market. By 1958 most instant coffee contained at least 50 percent robusta beans, with many cheaper brands using 100 percent robusta. Big coffee companies like Folgers and Maxwell House convinced customers to trade freshness for bland consistency and convenience. In 1960, the New York Coffee and Sugar Exchange lifted the robusta ban.

Ethiopian coffee has always been arabica and organic. Poor coffee farmers only work small plots of land and can't afford fertilizer. Despite these apparent qualities, even arabica beans organically produced can lead to an inferior taste. Washed coffees are generally held to possess a superior taste: wet processing giving cleaner and sharper flavors—hence, usually, command a higher price.

"In the 1950s the concept of washed Ethiopian coffee didn't exist," Willem Boot said. "It was something that emerged in the 1970s after funds were made available for washing stations."

Aware Fair Trade and organic certification isn't enough to compete on the international coffee market, the focus on taste is ongoing for cooperatives and the likes of Danie Regassa, SCFCU's chief cupper for three years. He evaluates all coffee batches before they're exported.

“South America controls the market as it has a large scale of production—it’s mechanized and not as labor reliant as Ethiopia,” he said. “But coffee is sensitive, especially from harvesting, and so when it comes to processing I think Ethiopia produces the best quality.”



Illustration 11: SCFCU’s chief cupper Danie Regassa and assistant cupper Menna Assefa test samples from batches of cooperatives’ coffees. Regassa initially evaluates the color, odor, and shape of the coffee beans; after roasting beans and mixing with hot water he “breaks” the coffee, evaluating its acidity, body, flavor, aftertaste, uniformity, cleanness, sweetness, overall balance of taste, and whether it fulfills the interests of the buyer. Photo by James Jeffrey.

Abdullah Bageresh, general manager of S.A. Bageresh coffee exporters, based in Addis Ababa, said combining organic certification with product quality results in a holistically complete coffee for the customer. He suggested due to Ethiopian coffee being organic by default, there’s an argument for some form of nationwide organic certification

or, rather, an organic “outing” that would be more beneficial than select coffees gaining premiums through individual organic certification. He added this might enable Ethiopian coffee to gain positive international coverage; inform those unaware of its inherent organic nature; and increase its value, competitiveness, and market share within the international market.

Questions have been raised over Fair Trade certification, also, concerning it’s being another form of charity that doesn’t enable self-sufficiency.

“Some in Ethiopia don’t like it because they don’t want to be rewarded with something like a handout,” said Adam Overton, a Los Angeles documentary filmmaker who discovered Ethiopian coffee after marrying an Ethiopian, culminating in his recent purchase of Ethiopian land to start a coffee farm. “They’d rather have the quality of the coffee command the price and be rewarded for hard work and a unique product on those merits, not on some arbitrary external system.”

For others, doubts undermine the entire Fair Trade movement.

“I don’t buy into it at all,” said Jon Gehrig, a geography graduate student at The University of Texas at Austin who specializes in the impact of globalization and consumerism on producing regions. He also spent six years as a barista in Oregon. “I’m very skeptical.”

His reservations center on additional costs for certification reducing farmers’ incomes by creating a middleman, and communities being split when some farmers become certified, while others are unable to and miss out on premiums their neighbors gain. His concerns extend into the future, also, he said, as producers become dependent on wealthier nations’ choices—those embracing Fair Trade—and alter processes to meet that demand. If the market shifts and demand drops, he added, those farmers may be stuck, unable to return to traditional farming practices due to lost skills.





Illustration 12: After being processed at a wet station, coffee beans are spread out to dry in the sun, surrounded by the hills of coffee growing land in Sidama province. Photo by James Jeffrey.

Gehrig said he prefers the Direct Trade movement that he envisages gaining traction and possibly replacing Fair Trade. It's based on relationships between buyers and producers that vouch for fair trade practices and organic quality through trust and personal knowledge without needing expensive certificates and their imposed methodologies, he said.

There is undeniable irony about the home of coffee needing certificates—especially organic related—to vouch for its coffee that couldn't be anything else. Bageresh said Ethiopian coffee's varieties and flavors can't be matched anywhere else in the world.

"If you take our best coffees, they are better than coffees that sell for 10 times the price of ours," he said. He pointed out that renowned coffees like Jamaican Blue

Mountain—selling per pound between \$48 in the U.S. and \$62 in Japan—built reputations largely through good marketing.

“Imagine if Ethiopia had good marketing,” Bageresh said. “Now, without any marketing, we sell every single bean.”

The want of effective marketing for Ethiopian coffee became especially apparent to me in Kaffa province, the fabled birthplace of arabica coffee. I’d traveled to Jimma, 200 kilometers southwest of Addis, to visit the Japan International Cooperation Agency branch working to create a sustainable future for some of the province’s coffee farmers. I’d been invited by Fumiaki Saso, JICA’s project coordinator, who told me after my arrival that I had to visit Kefta Muduga, 40 kilometers outside Jimma. “What’s so important about that place?” I asked, never having heard of it. “Because that is the exact location where coffee comes from,” Saso replied. He was offering to take me to the coffee equivalent of the source of the Nile.

We drove to Kefta Muduga, along a mixture of asphalt roads and potholed tracks lined with wood and mud huts, smoke emanating out of corrugated-iron rooftops, while darkened doorways emitted no electric lighting. Saso sat in the front of the Toyota next to Tewodros, the driver, while I sat in the back, unable to escape the irony that the billion-dollar coffee industry was born here, resulting from the seed of an Ethiopian shrub’s berry and its internal pesticide system: caffeine—toxic to some small organisms, mildly intoxicating to larger ones like humans.

We sped past animals ambling in houses’ gardens and locals walking on grass verges, most barefoot, some carrying huge bundles of firewood on heads or large water-filled yellow containers roped to backs.

“At the Tokyo Olympics the Ethiopian marathon runner Abede Bikila made a special impression on the Japanese population,” Saso said. He added how Ethiopia having an emperor like Japan in the 1960s helped strengthen ties between the two countries.

Eventually we came to a sign indicating one kilometer to the birthplace of arabica coffee—its peeling, handmade design indicative of minimal marketing—with an arrow pointing off the road into what appeared sheer vegetation. Tewodros applied the brakes suddenly. He slowly swung the vehicle onto a grass track no wider than the vehicle’s width that threaded through a coffee farm. As the vehicle edged down the track, harvested coffee trees’ spindly white branches bounced off the window panes.

We came to the farm’s limit that opened onto a clearing containing a hillock not much wider than a baseball infield: arabica coffee’s birthplace. The only evidence to corroborate this fact was a small, concrete pillar, waist-high, at the crest of the hillock—on it a plaque commemorating the breaking of ground to build a museum celebrating the area’s unique coffee heritage. There was nothing else. I looked at Saso. “Not much, really,” I said. He smiled and raised his eyebrows before walking back to the vehicle; leaving me alone at the source of the multi-billion dollar coffee industry, surrounded by the verdant hills of Kaffa and Ethiopia’s mystique.

This was typically Ethiopian, really. No fanfare or pomp to mark the beginnings of the world-dominating commodity that is coffee. Much like the fact Ethiopia, one the world’s poorest countries, backward in so many ways, is likely the cradle of humankind that has reached such technological advancement in this latest millennium of human existence. Ethiopians seem to make a specialty of retaining the humbleness of origins.



Illustration 13: Camel herders gather in the town of Hayk on market day. Photo by James Jeffrey.

But Ethiopia's draw isn't entirely unheeded, and foreign investment, such as JICA's, is being used to embolden Ethiopia's coffee industry. JICA works alongside the local Oromia Forest and Wildlife Enterprise to encourage farmers to produce sustainable coffee within the 150,000-hectare Belete-Gera Regional Forest Priority Area. JICA aims to combine farmers' livelihoods with forest management by providing farmers access to international coffee sales as long as they preserve the forest. In addition, JICA teaches farmers how to improve quality and flavor—adding value to their product.





Illustration 14: Sun dried coffee grown in the Belete-Gera Regional Forest Priority Area, to be exported by JICA to Japan. Photo courtesy Fumiaki Saso and JICA.

The coffee JICA sells for the farmers isn't Fair Trade certified, but Rainforest Alliance certified due to the latter insisting upon a stricter set of environmental criteria, which chimes with JICA's parallel focus of forest protection. Both certification systems overlap in parts, though Fair Trade focuses more on trade dynamics, with Rainforest Alliance more on environmental impact—an example of how certification systems diverge for commendable reasons not clear to the customer encountering differing certificates on products. With the revenue JICA receives from sales to the Japanese market, after its costs are covered, 30 percent goes to the Oromia Forest and Wildlife Enterprise, and 70 percent to farmers. JICA isn't allowed to benefit from the sales, Saso said.

Forest coffees like JICA's are gaining in popularity in America and Europe, with conservationists embracing the retention of natural vegetation during the farming process. In Japan, Saso said, customers are still to be won over by certified coffees like forest coffee (also known as shade-grown coffee), considering the flavor, despite being as organic as it gets, inferior to other coffees.

"We have to sell the product but also sell the story behind the coffee to the market," Saso said, adding that as of May 2012, project oversight would be handed over to the Oromia Forest and Wildlife Enterprise. JICA's branch in Jimma would close.

JICA's Jimma enterprise represents a development model akin to cooperatives' that aims to give ownership of an issue to those affected by it—Ethiopians. Some argue the strategy is a much-needed improvement on what historically became the norm with Western NGOs' assistance resulting in Ethiopia being unable to help itself, necessitating external influence remaining and thereby creating a debilitating cycle.

"It's a problem of dependency syndrome," said Mesay Kassaye, working in Ethiopia for the Costa Foundation—part of the British-based High Street chain Costa Coffee—though he used to work for NGO Self Help Development International. "When an NGO enters a new community, they bring all things, so the community and government remain beggars, with no role in development activities—when the NGO goes, everything collapses." He added some NGOs channeled 75 percent of budgets to cover administrative costs, leaving little to spend on the country they were meant to help.



Illustration 15: Excited children cluster round my camera's lens outside a health clinic funded by Fair Trade premiums in Borena province. Photo by James Jeffrey.

“Cooperatives are a bridge to development,” he added. He said Ethiopia’s problems are chronic, requiring the sustained methods of cooperatives to tackle them, unlike NGO methods he compared to taking a spoon to the ocean.

“Nothing is totally wrong or bad, good or fair—things are relative,” said Haile Gebre. “But if I’d been president of Ethiopia in 1973, I’d have banned NGOs from Ethiopia.” He added Ethiopians might then have thought more for themselves about solving continuing problems, leading to long-term self-sustainability. NGOs are good for catastrophes, providing temporary support, but for Ethiopian poverty they aren’t the solution, he said.

“We are development orientated, not relief orientated,” said Amsalu Andarge,

ACDI VOCA's Field Officer Coordinator for the Oromia Region. "We focus on capacity building and promoting business growth."

When U.S. based NGO Agriculture Cooperative Development Integrated Volunteers Overseas Cooperative Assistance arrived in Ethiopia in 1995, a prominent member was the late Worku Mekashu, who met Haile Gebre, resulting in ACDI VOCA's program called Cooperative Union Project that created unions for agricultural crops, Andarge said. CUP was replaced by Agricultural Cooperative Ethiopia, a program that resulted in the first coffee unions and established cooperative bureaus at regional levels to strengthen unions.

A key component to this strategy was introducing the value addition concept—value being added to a product at each stage of production. For many decades, Andarge said, Ethiopian coffee was sold with no value addition. It was just collected from farmers and exported. Now unions and cooperatives are developing their own brands with integral value-add—Fair Trade, organic—to bolster their clout on the international market.

"Cooperatives established by ACE are now leading the main role in the economic transformation of the country," Andarge said, "giving new opportunities to many people in Ethiopia with new jobs."

But to hear some involved in Ethiopia's coffee industry tell it, and from what I witnessed, there is still plenty of room for improvement. It's recognized that cooperatives on their own can't achieve long-lasting improvements for farmers and their communities, and with the cooperative movement developing, overcoming current problems remains critical for the movement's success.



Those I spoke to listed numerous issues outstanding: empowering farmers through savings-led credit schemes to facilitate income management; modernizing farming methods and implementing good farm management to break current trends of low yields by selecting from successful crops to increase yields without chemical use; low participation of members at grass roots levels; land degradation; lack of knowledge about how to compete in international markets; and widespread lack of management competency.

Contained within the cooperative business model is both the key to its success and the potential for problems, said Haile Gebre. “Cooperative businesses are different to other businesses,” he said. “It is self-contained: Members are producers, sellers, buyers, consumers—the cooperative that is member led and member orientated can be efficient and effective.”

He added, however, if cooperatives start to focus on profit and neglect their relationships to members, this could transform them into demand-and-supply driven oligarchies. In turn, they could face difficulties during depression through potential bankruptcy, but by remaining member orientated—retaining founding principles—members could refinance and preserve them during difficult times, Gebre said.

“Internationally it is the time of cooperatives,” he added. “Globalization has ended with bankruptcy.”

Due to their symbiotic relationship, unions are vulnerable to the same potential problems as cooperatives.

“In the past and still, currently, the unions have been accused of corruption,” Willem Boot said. “There have been not just rumors, but various incidents where fingers have been pointed at specific unions.”

In addition, he said some argue relatively little money from what's paid to unions comes back to the farmers.

"If you do the math, what the farmer really receives is nothing more than what he would have from a normal commercial private buyer," he said, and added that as a result, some cooperatives are looking to become independent.

Boot said unions face three main problem areas: logistics, reliability and consistency, and an inability to reward specific cooperatives for quality. He explained a continuing concern for buyers is timely delivery of coffee, as well as batches of coffee matching initial samples supplied to buyers.

"If you supply coffee that's not the same as what you promised—you're out," he said.

Finally, proportional sharing of profits to cooperatives though fair means there isn't a true incentive to go that extra mile for quality, he said.

"As they get bigger there may be problems," said Kassu Kebede, program manager for ACDI VOCA, regarding both unions and cooperatives. "But that can't be avoided, as they grow stronger, they'll diversify their activities and become business orientated; they should do this—they need to compete with the competition." He said India has successfully grown large, business orientated cooperatives, competing internationally, while still serving farmers. He said you can't avoid being business minded if you want to compete and added it's the government's responsibility to arrange legal matters to guarantee things, structuring oversight to ensure unions balance business orientated drive for expansion and growth with the needs of cooperative members.

"Strengthening cooperatives is a key issue," he said, "as their activities are still limited." He added that unions, on their own, aren't strong enough to assist all cooperatives—those gaps need be filled by NGOs like ACDI VOCA and the government.

The Ethiopian government's relationship with the coffee industry has, historically, been a rocky one. It remains a relationship that can't be ignored.

"Cooperatives are the third sector in any country's developmental endeavor," Andarge said and added government and private sectors are the other two. Broader infrastructural change to the Ethiopian coffee industry is needed, enabling cooperation among the three sectors to generate sustainable development, he said.

Currently, the government is supporting the industry, recognizing its contribution to Ethiopia's fragile economy and the advantages of internal development over disaster relief from foreign organizations. But it hasn't always been so.

"Government people didn't give coffee priority in the Ministry of Agriculture," said Kebede, who before ACDI VOCA worked in the ministry's coffee department for 27 years. "It was a very small department and was even dissolved at one point into the Crops Department."

He explained the government decided coffee, being indigenous, didn't require further assistance; instead the government focused on flour, wanting to diversify. This policy was unsuccessful, and the government now appreciates the merit in retaining an existing strength—subsequently the coffee department was reinstated, Kebede said.

The government has reduced its export tax to 2.5 percent for coffee exported through unions to encourage and increase their growth and revenue, which in turn goes back to cooperatives and farmers.

Andarge said the Ethiopian government still pays too little attention to cooperatives, focusing primarily on the private sector and its bigger profits. At the same time, he added, the cooperative movement can only establish truly sustainable institutions by becoming more in line with government policies—not isolating the government's role.

“If the government links in with cooperatives, then sustainability is assured,” he said.



Illustration 16: A girl sells onions at the market in Jimma. Photo by James Jeffrey.

Young boys with runny noses peered curiously into the cafe. I sat under its corrugated-iron roof in the Dimtu Hambela district of Guji province, north of Borena province, perched on a plastic stool too small for my 6-foot, 4-inch frame.

“My origin is here,” said Azamuch Lema, chairperson of the Benti Nenka Coffee Farmers Primary Cooperative, who’d invited me to join him and other cooperative officials for a coffee. “I don’t want to move.”

Yards away from where I sipped a delicious, locally grown Sidama flavored coffee for the price of 2 Birr (11 cents), the cafe front opened onto the dusty street where

goats and dogs wandered aimlessly and teenage boys played table tennis next to a dusty patch of grass circled by barbed wire, in which stood flagpoles flying the Ethiopian and Oromian flags.

Despite the difficulties of everyday life—Lema’s community still lacks potable water and adequate education facilities—the cooperative has made progress. Lema said in 2010 it borrowed money from OCFCU to buy its farmers’ coffee cherry and then sold those beans to OCFCU for a profit of 165,000 Birr (\$9,705). He added that the cooperative has 215,000 Birr (\$12,647) in a bank account.

Back in the U.S., I bought a cup of Yirgacheffe coffee in a New York Starbucks. It cost \$2.95 (50 Birr or four days’ wages for a part-time Ethiopian coffee laborer), and was chalked up on the menu board as an “exotic, rare, exquisite” coffee—hallmarks of so-called specialty coffee. What that pithy description left out was that the coffee had been farmed in one of the world’s poorest countries, using the simplest farming methods. I was confident that few of the teeming customers in the busy store had considered the other side of such exotic, rare, and exquisite coffee.

Such contradictions in America vary in degree. In Austin’s Strange Brew coffee shop I purchased a Yirgacheffe coffee for \$1.89 (32 Birr), and enjoyed it in a peaceful setting, with empty Fair Trade coffee sacks hanging on the walls. But even there, I wondered, to what extent did customers savoring Ethiopian beans, hunched over their laptops, appreciate the living conditions most Ethiopians involved in their coffee industry faced. Then again, should such customers be expected to fully understand? One can hardly begrudge their desire for a decent coffee during their busy day, minus a socioeconomic analysis of the country that produced their coffee?

Apportioning blame isn’t likely to alter how much of the world’s coffee consumption remains detached from the realities of production. Better the proactive steps

Ethiopian cooperatives are taking to improve their farmers' and communities' livelihoods. These measures are slowly addressing inequities within the global coffee industry that have resulted in Ethiopian coffee being undersold compared to more expensive but inferior coffees from other countries, or not sold at all.

But people are rediscovering real coffee. Adam Overton compared the resurgence of interest in specialty coffee, benefiting Ethiopia, to what happened when the red-delicious apple was perfected in America to the point it became inedible and had people wondering what a proper apple should taste like.

“Once you start drinking good coffee, you can’t go backwards,” he said.

After I’d discovered Ethiopia in 2000, there was no turning away from the country—it has kept drawing me back. On my last day in Addis Ababa after witnessing the December harvest, I surveyed the city’s gradually heightening skyline and the growing number of cafes and shops signaling financial improvement—for some. Likewise, as a result of more coffee drinkers around the world discovering its quality beans, some in Ethiopia are benefiting as it catches up with the market it started centuries ago with the first coffee exports to Yemen. Those exports crossed the Mandab Strait that joins the waters of the Red Sea and the Gulf of Aden, between the Horn of Africa and the Middle East’s southeastern tip, and probably witnessed modern humans’ earliest migrations out of Africa, roughly 60,000 years ago.

“As Ethiopia is evolving now,” Boot said, “it’s going through a long cycle of liberalization, which will probably take 20 years to complete.” He added, “If Ethiopia could do a better job in selling its unique story, it could make significantly more money for the farmers.”



Illustration 17: An Ethiopian man and boy in Tigray, Ethiopia's most northerly region, south of the border with Eritrea. Photo by James Jeffrey.

In addition to the unique story of Ethiopia's coffee are its tangibly unique qualities to help it gain recognition.



“The future is looking very bright for Ethiopian coffee,” Kebede said and added Ethiopia is well placed to provide certified specialty coffee types increasingly demanded by the world market—such as highland coffee, forest coffee, shared-tree coffee, and even naturally decaffeinated coffee—with its variable agro-ecology and lands, much still unused. He said Ethiopian coffee’s rich genetic wealth—unmatched in the world—can facilitate the development of further unique coffees, as well as disease resistance without the chemicals other coffee growing countries rely on: retaining important organic status that adds crucial sale’s value to coffee sold.

Despite unrest in Sudan, South Sudan, and Somalia that share some of its borders, and ongoing tension along its border with Eritrea, as well as internal and international criticism of the government’s disingenuous democratic commitment, Ethiopia remains relatively peaceful and stable. Admittedly, it doesn’t take much to unsettle an industry based on a fragile commodity like coffee.

Over the years I’ve questioned the quality of my commitment to Ethiopia—visiting, but always leaving, heading back to more comfortable distractions. Yet what is a better alternative? Likewise, the conscientious coffee customer debating variations in coffee prices should recognize it’s a long way both geographically and logistically from Addis Ababa to America, and the alchemy involved in coffee production and export defies simple comparisons, arithmetic or answers.

Consumers, ultimately, have to weigh the argument of economic relativity resulting from the additional costs of Western economies and lifestyles against the stark differences between their lives and those of Ethiopians farming coffee. Although global economic-markets can seem omnipotent, some argue consumers can have an impact through their purchasing decisions. But it’s a busy world. In the rush to get to work in the morning it’s easy to pay scant attention to a handful of coffee beans.

“I like coffee,” said Haile Gebre, sipping a small cup of it during our interview in Addis Ababa, smiling as he fixed me with his impassioned eyes. “I grew up with coffee, it’s a very lovely tree—when I see the tree it’s different to how you see it.”



Illustration 18: A traditional Ethiopian coffee ceremony, in which after the beans are ground by mortar and pestle the grains are roasted over charcoal to make three successive pots of coffee: The first round is called “abol,” the second “huleut teunya,” and the third and most important, “beureuka,” which means “blessing”; accompanied by popcorn and fresh bread to snack on. The ceremonies are a great time for conversation among friends, families and neighbors, and can last for hours. Photo courtesy Fumiaki Saso and JICA.

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## **Vita**

James Jeffrey was born in London, England, part of the United Kingdom. After completing his work at Ampleforth College, North Yorkshire, England, in 1997, he entered Sheffield University in Sheffield, England. He received the degree of Bachelor of Arts from Sheffield University in May 2000. That summer he visited Ethiopia for the first time, living there for six months between June and December teaching English as a volunteer. He returned to Ethiopia in November 2004 and visited again in July 2010. In August 2010 he entered the Graduate School at the University of Texas at Austin, and visited Ethiopia in July 2011 and for two weeks during December 2011 to conduct the research for this MA Report.

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This report was typed by James R. F. Jeffrey.