FOLIA GEOGRAPHICA • ISSN 1336-6157 (hard copy) • ISSN 2454-1001 (online)

THE NEW DEVELOPMENTS IN COFFEE CONSUMPTION IN SLOVAKIA WITH EMPHASIS ON SMALL COFFEE ROASTERS

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Received: August 25, 2021 | Revised: November 12, 2021 | Accepted: November 15, 2021
Paper No. 21-63/2-606

Abstract
The spatial and social aspects of food chains have recently become of an increasing interest for geographers. One of the most important agricultural commodities and most popular beverages is coffee which has become a subject of growing body geographical research. Over the past decades, coffee consumption has undergone significant transformation often divided into so-called three waves of coffee consumption. Their onset, however, has not been uniform across the globe and the post-socialist countries have experienced recent developments with substantial delay. The most recent third wave has been initiated by the actors in the last stages of the coffee chain - small-scale coffee roasters as a response to growing demand for quality. The third wave coffee roasters are a relatively new phenomenon on Slovak market which has not been studied yet and our paper aims to fill this gap. The main purpose of our paper has been to map them, explain their development in the context of the three waves and investigate their spatial distribution. The development and geographical distribution of third wave coffee roasters are closely related to the economic condition and reflect the socioeconomic disparities within the country. As our data has shown, the third wave roasters concentrate disproportionally in prosperous urban areas. The relationship between the number of roasters and the distance from the nearest regional centre is well described by exponential function. The surge of third wave coffee is associated with changing sentiments in consumer culture – backlash against mass consumerism and growing interest in alternative consumption which is emblematic to affluent urban consumers. Central and eastern Europe is experiencing growing demand for coffee and specialty market has not yet reached its ceiling which makes third wave coffee a perspective segment. Although the pandemic has caused short-term downturn, nonetheless, it likely will not affect the positive outlook in long-term.

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Key words
Small coffee roasters, coffee consumption, alternative consumption, specialty coffee, waves of coffee consumption, Slovakia.

INTRODUCTION

Geography of food is a new subdiscipline of geography and can be considered a part of economic geography (Colombino 2014, Spilková et al. 2016, Spilková and Šifta 2017, Niles and Roff 2008). One of the most important food (agricultural products) is coffee which has been of a growing interest of geographers in recent years (Grabs and Ponte 2019).

Coffee is one of the most popular beverages, more than 2 billion cups are consumed worldwide daily, and its total consumption exceeded 164 million bags in 2019/20 (ICO, 2020). The coffee industry is massive – coffee beans comprise one of the most traded agricultural commodities worldwide (Tucker, 2011; Talbot, 2004; Vergo and Almeida, 2020) and millions of people across the globe are involved in the coffee commodity chain. It is estimated that coffee production is the primary source of income for some 125 million people mostly in the countries in a band stretching between the Tropic of Cancer and the Tropic of Capricorn (Koehler, 2017). The major suppliers are developing countries with suitable climatic conditions for cultivation of coffee, while the demand is concentrated predominately in industrialized economies of Europe and North America (Fitter and Kaplinsky, 2001; Samper et al. 2017, a) which dictates the spatial structure of the coffee trade chain. The coffee commodity chain faces vital issues regarding distribution of income and profit (Talbot, 2004) with direct impacts on millions of households, additionally, the environmental challenges are becoming ever more critical (Vergo and Almeida, 2020). On the other hand, the consumption side of the coffee market plays an essential role in the global consumer culture (Samoggia and Riedel, 2018; Vergo and Almeida, 2020). The industrialized countries of Europe and North America form the core of the coffee consumer culture and stand out as the largest consumers accounting roughly for a half of the world's demand for coffee (ICO, 2018). However, mostly young people across the globe are taking up the habit of drinking coffee which translates into steady growth of demand for this crop, with most notable expansion in regions of central and eastern Asia, the Arabian Peninsula and Eastern Europe (Vergo and Almeida, 2020).

Notwithstanding, the recent global boom was preceded by a continuous slowdown of coffee consumption in the traditional core regions. Several decades ago, coffee consumption had experienced stagnation, most notably in North America, which was often attributed to consumer disenchantment from unsatisfactory quality of the product. For decades, coffee market had been dominated by large players – transnational corporations aiming to push prices at the lowest possible levels which resulted in falling quality of the product (Tucker, 2011). At that point, small independent roasters and premium coffee shops entered market and took advantage of consumers' growing desire for quality, variety, and exclusive experience. Initially aimed at a narrow niche of consumers, specialty coffee has gradually gained a firm place in mainstream coffee culture. These shifts in coffee consumption patterns came as no surprise in the context of recent developments in consumer culture characterized by backlash against limitless mass consumption accompanied by surge of alternative and sustainable consumption (Križan, et al. 2019).

All of that, however, has affected Central and Eastern Europe (CEE) with substantial delay and locally roasted coffee is still seen as fancy luxury for the urban upper-middle class. Our paper aims to uncover the context of the rise of the phenomenon in Slovakia and examine geographic patterns. The consumption for coffee in CEE is among the fastest growing worldwide (Vergo and Almeida, 2020) which is accompanied by increasing demand for high quality products attributable to improving economic situation (Hernandez-Aguilera et al. 2018, CBI, 2020b, Mansfield 2003). Our example of growing demand for a premium coffee well illustrates a broader trend, a shift of consumers' priorities towards high-quality products which has become a subject of newly established subdiscipline geography of quality (Mansfield, 2003). Furthermore, the market for specialty coffee in CEE is not yet saturated which creates a potential for further growth (CBI, 2020b).

There has been a growing interest of geographers investigating food products in the aspect of quality which is becoming an increasingly important factor in consumer decision making process. Many authors have investigated the shift towards the 'quality' food production and consumption mostly referring to North America and Western Europe. However, there are no geographic studies documenting similar developments in Slovakia. Our paper aims to fill this gap and its primary focus are small-scale local coffee roasters which provide a prime example of growing demand for high quality products in Slovakia. We will denote to them as 'small coffee roasters', 'third wave coffee roasters' or simply 'small roasters' as it has been used by several authors (Guimarães et al. 2018, CBI, 2020; Weber and Wiek, 2020; de Souza and Schiavi, 2020 and others) to emphasize the difference between the large quantity-oriented coffee roasting companies and the small-scale roasters associated with alternative consumption.

THEORETICAL FRAMEWORK

Over the past decades, the supply chains and consumption patterns of food products have undergone a significant transformation. Geography of food is an emerging subfield that investigates food and agricultural products as a geographic and societal phenomenon which links primary, secondary and tertiary sector, or in other words, concerns the dynamics the entire food chain from production to consumption (Winter 2005, Niles and Roff 2008, Spilková et al. 2016). The global scale of supply chain and significantly changing consumption patterns make coffee a particularly interesting subject of research for geographers. The recent evolution of coffee consumption is commonly described in terms of the so-called 'three waves of coffee consumption (e. g. Samoggia and Riegel, 2018; Teixeira, 2020; Torres and Pereira, 2016; Koehler, 2017). Historically, coffee had long been merely an urban luxury accessible only to the privileged narrow elite (Bayer, et al., 1997), however, the onset of the Industrial Revolution and mass production allowed wider availability of this beverage. Subsequently, coffee became a mass commodity and its consumption increased rapidly which is known as the first wave of coffee consumption (Teixeira, 2020; Torres and Pereira, 2016; Koehler, 2017). Whereas the first wave aimed at convenience and at-home consumption, the second wave responded to growing concerns around quality resulting in the birth of specialty coffee (Torres and Pereira, 2016; Lewin, et al., 2004; Sepúlveda, et al. 2016). This period was associated with the increasing role of out-of-home consumption, formation of coffee chains like Starbucks. Tucker (2011), Koehler (2017) as well as authors Samoggia a Riedel (2018) associate the formation of Starbucks with the emergence of the second wave, followed by the massive expansion of the specialty market (Koehler, 2017). The third wave was initiated by the actors in the final stages of coffee production chain, mainly small roasters and has given rise to connoisseurship consumption, merging distinctive coffee experience and a vision of ethical marketplace (Sepúlveda, et al. 2016; CBI, 2020a; Koehler, 2017). However, at the core of the rise of the small coffee roasters was the consumers' dissatisfaction with the quality of the product, desire for a distinct experience and the final processers responded to customers' changing priorities regarding the product choice (Murdoch et al. 2000, Mansfield 2003, Carvalho et al. 2015). The product quality is often related to the spatial organization of food chain, a typical example are local products associated with a particular locality. However, small-scale coffee roasters do not process local ingredients, like, for instance, local winemakers (Tej 2014). However, there is only limited literature on the phenomenon of small roasters which played central role in emergence of the third wave, and our paper aims to fill this gap.

The coffee market can be broadly divided into the price-oriented commodity market for conventional coffee of standard quality and specialty market operating at lower quantities and higher prices aiming to deliver products of exceptional quality (CBI, 2020a). Although there is no clear consensus in literature on the definition of specialty coffee, according to the Specialty Coffee Association (SCA), coffees with cupping scores above 80 at 100-point scale are classified as a specialty (SCA; Koehler, 2017). Cupping score is a widely accepted measurement of quality of coffee based on strict standards set by SCA at every stage of the coffee production. Specialty coffee are beans of the highest grade available (Koehler, 2017), characterized by distinctive flavour, produced in special micro-climates, often labelled as single origin. The central focus is placed on the coffee bean itself and its unique characteristics which is essential to the most recent third wave of coffee consumption. Although specialty coffee industry has experienced substantial upsurge over the past decades, research devoted to this topic is still quite limited. Some authors examined specialty coffee consumption however, the research is mostly confined to traditional industrialized economies of North America (Torres and Pereira, 2016; Quintao and Brito, 2016) and Western Europe, or largest coffee producing countries such as Brazil (Teixeira, 2020; Sabio and Spers, 2020). Very few authors investigated specialty coffee consumption in post-socialist economies of CEE, where the evolution of coffee consumption was marked by noticeable delay and has experienced boom only recently (Sepúlveda, et al. 2016, Guimarães et al. 2018, Vergo and Almeida, 2020).

Understanding of the process of food choice and motivation behind coffee consumption is vital to get the full picture of the rise of specialty coffee. Some of the key questions concern consumers' willingness to pay more for higher-quality and better-tasting coffee, and the demographics and economic background of consumers who are more likely to engage in consumption of the third wave coffee. Product choice is influenced by several factors, including subjective attitudes and values, personality, lifestyle of the buyer (Lanfranchi, et al, 2016; Andorfer and Liebe, 2015), and more objective aspects such as economic constraints, primarily price of the product and income (Cullen and Kingston, 2009). Considering food choice more specifically, the decisive factors include price (Asioli, et al. 2016; Andorfer and Liebe, 2015; Sapio and Spers, 2020) and personal tastes (Cullen and Kingston, 2009; Sapio and Spers, 2020) which also applies to coffee choice as shown, for example, by authors Sapio and Spers (2020).

Some of the major constraints on coffee consumption are economic - the relationship between coffee consumption and income, and the effect of price on the process of coffee choice. Number of studies have shown that income is the key determinant of how often and what type of coffee do consumers drink (Samoggia and Riegel, 2018; Lewin et al., 2004; Torga and Spers, 2020). Moreover, income has been shown to be positively correlated with coffee consumption (Torga and Spers, 2020). Growing incomes have played an essential role in emergence of the third wave, indeed small coffee roasters rely on consumers with higher purchasing power which has decisive effects on their geographical distribution. Despite the rising incomes, specialty coffee remains out of reach for some consumers due to relatively high price levels which still poses a significant constraint on the growth of the specialty segment (Andorfer and Liebe, 2015).

Superb sensory characteristics and variety of distinctive flavours are among the key attributes which differentiate specialty coffee from conventional one. As Samoggia and Riegel (2018) concluded in their comprehensive literature review, taste remains the primary driver of choice of specialty coffee.

Last but not the least, our investigation would not be complete without considering lifestyle factors and personal values which have a firm place in consumer decision-making process (Lanfranchi, et al, 2016). As much as product choice is about satisfying basic needs, it is also a means of expressing one's values, identity, and social status (Lanfranchi, et al, 2016; Andorfer and Liebe, 2015). This is closely related to the phenomenon of consumer society where individual's identity and status are defined more by his consumption patterns than class or position within the socio-economic hierarchy (Križan, et al. 2019). The rise of third wave coffee consumption can be understood in context of the move towards so-called post-consumer society which Križan, et al. (2019) described as backlash against mass production and the surge of alternative and sustainable consumption. Open-minded affluent urban consumers (Cullen and Kingston, 2009, Spilková J. 2017.) have been among the first the question the conventional mass consumption, seek out novel products and willing to pay for high-quality, locally produced, or certified products.

Increasing concerns regarding global environmental and social issues have given rise to ethical and environmentally responsible consumption (Hudson, et al. 2013; Andorfer and Liebe, 2015). A well-researched phenomenon within the specialty segment is conscious consumption (Samoggia and Riegel, 2018) associated with Fair Trade (FT), organic, and other certifications (e. g. Andorfer and Liebe, 2015; Basu, et al, 2017; Sepúlveda, et al. 2016, Obermiller, et al. 2009; Lee and Bateman, 2021; Bravo, et al. 2013; Hwang and Chung, 2019; Chen et al. 2014). It should be pointed out though, that certified coffee, represents just a niche segment within the specialty coffee market. Furthermore, some studies have noted preference shift from organic products to local products and country-of-origin labelling (Mugera, et al. 2016) which adds to the appeal of locally roasted coffee. Local or food products labelled with geographical indication (GI) are subject of several papers (Wann, et al. 2018; Giraud, et al. 2005; Jekanowski, et al. 2000, Sapio and Spers, 2020), however, by far not as well researched as consumption of FT certified and similar products.

DATA AND METHODS

Small coffee roasters are a new phenomenon on Slovak market which has not been studied in academic literature, neither there are any comprehensive data on the issue. Thus, the first step to conduct an analysis of the emerging specialty coffee market in Slovakia was to gather the information about the small roasters. The aim was to collect data on as many small coffee roasters in Slovakia as possible which was carried out through internet search in the summer 2018 and updated in the summer 2020. Our final database consists of 82 firms, likely though, the sample does not include all coffee roasters operating in the country, partly because not all firms have a website, or a social media account. Although nowadays majority of firms advertise themselves online, this does not always must be the case especially when considering small, often family businesses, which are subject of our study. Furthermore, despite the current slowdown attributable to the pandemics, new businesses are emerging almost constantly which makes it impossible to keep track of every single newly opened coffee roaster. Conversely, many businesses have been through serious hardship due to the pandemic, some of them were forced to close down, what might have also been the case for some of the small coffee roasters under our investigation. Albeit our sample likely missed some firms, it represents reasonably well the current network of small-scale coffee roasters in Slovakia. Considering the primary subject of our investigation that concerns geographic aspects and temporal patterns of this recently emerging phenomenon, the data collected includes primarily information about location and the year when business was established. Some information not available online was completed thought e-mail and in person communication. A part of in person interactions took place at festival Coffee, tea, chocolate (Káva, čaj, čokoláda) in Bratislava (15. – 16. 11. 2018).

The primary purpose of our study has been to investigate and identify the decisive determinants the spatial distribution of small-scale coffee roasters. Hence, based on a solid body of literature on consumer behaviour emphasising the role of economic constraints on purchase, we assumed that economic situation would have major effect on geographical distribution of firms offering a premium relatively pricey product. Extending our considerations beyond purely economic attributes, as noted above, the rise of specialty coffee can be understood in context of postconsumer culture. Open-minded, well-educated consumers from higher social classes are more likely to engage in alternative consumption and precisely these are the target groups of the third wave coffee roasters. As Cullen and Kingston (2009) concluded, urban consumers seek out novel products and experiences more which also applies to locally roasted specialty coffee. This is only one of many reasons though why are large cities so attractive for third wave coffee roasters. These include larger population implying higher purchasing power overall, already mentioned higher incomes and in some cases presence of tourists.

To examine the relationship between number of roasters and the time distance from the nearest regional centre we used regression analysis in MS Excel according to Gubo (2016), similar method has also been applied by Gáll and Özoğlu (2020), Stanek et al. (2021) etc. The data on time distances have been collected via Google Maps, as the shortest distance from the centre of the nearest regional center. Our regression model considers the number of coffee roasters as the dependent variable and the direct time distance to the nearest regional centre as the independent variable. Then the roasters were divided to intervals according to their distance from the nearest regional centre. The first interval was chosen to the distance of 25 minutes from the nearest regional centre to account for longer distances within the larger cities, whilst all the roasters localized in a regional centre were included in the first interval. The width of the following intervals was set to 15 minutes. Finally, we generated regression function which most closely fitted our data and coefficient of determination has been used to express how well our model explains the observations. Coefficient of determination denoted R^2 provides a measure of the proportion of the variation in the independent variable explained by the dependent variable. R^2 takes values ranging from 0 to 1, where if the coefficient of determination equals 1, the observations exactly match outcomes predicted by the model.

Furthermore, economic situation of the population in Slovakia has been considered as the second determinant in our analysis. More precisely, we investigated the relationship between the location of roasters, average monthly income, and unemployment rate. We worked with data on average monthly wages in Slovakia on the level of districts (2020) available on the website of Štatistický úrad SR (ŠÚ SR, 2021a, 2021b). However, Bratislava and Kosice were not divided into districts but instead considered as single geographical units to demonstrate the agglomeration effect.

RESULTS AND DISCUSSION

Three waves of coffee consumption in Slovakia

As already noted, the so-called 'three waves' are a widely accepted framework to characterize the recent evolution of coffee consumption, yet very few authors examined temporal and spatial patterns of coffee consumption in central Europe in these terms. The three waves of coffee consumption occurred in the post-socialist countries with a significant delay compared to North America and Western Europe with more mature coffee markets (Duszak, 2016). Identifying the three waves of coffee consumption in Slovakia provides a useful context to explain the recent emergence of small roasters.

In the second half of the 20th century, the market in countries of the Eastern bloc was dominated by lower quality Robusta (Duszak, 2016). Until 1989, most of the coffee in Czechoslovakia had been consumed at home and the industry aimed at convenience which are signs of the first wave. The political changes in 1989 and economic liberalization allowed transnational players to enter the markets of CEE and the coffee market began to be influenced by trends from outside which leaded to gradual emergence of initial features of the second wave in Slovakia. Among the first international coffee chains, associated with the second wave, to enter Central and Eastern European markets were Tchibo and Eduscho in the early 1990s (Tchibo.com, 2019) and Coffeeshop Company in the first decade of the 21st century (Coffeeshop Company.sk, 2019). In 1998, however, Tchibo Slovakia took over the brand Eduscho (Eduscho.sk, 2021).

The revitalization of the economy which translated into growing incomes contributed to rising demand for coffee (Torga and Spers, 2020; Vegro and Almeida, 2020) and opened market for the specialty segment aimed to offer high quality products. The introduction of the third wave coffee to Slovak consumers was gradual, the first small third wave roasters began to appear in Slovakia in the 1990s and 2000s, starting off in modest numbers. In our sample, only 5 out of 82 small roasters were launched in the 1990s, which accounts for roughly 6 % of our total sample (Fig 1). Although all of them are localized in the western half of the country, only single one of them is situated directly in Bratislava. Of the roasters founded in the 1990s, the easternmost one was opened in Zvolen in 1993. The next decade brought more steady growth, in average, the number of coffee roasters was increasing at rate of more than one per year. In this period, quite surprisingly, most of the newly launched coffee roasters was localized in the Košice Region. However, it was not until the 2010s when the segment truly took off. In our sample, the vast majority, 66 roasters of 82, were opened between 2011 and 2020, of which significant proportion is situated in Bratislava Region. The most notable yearly change was recorded in 2016, when 10 new coffee roasters were opened. On the contrary, the lowest yearly change in the second decade was recorded in 2012 when only 2 new coffee roasters were launched. As CBI (2020) and Duszak (2016) pointed out, Central and Eastern European markets are becoming increasingly interesting for small-scale high-quality roasters with remarkable potential for growth in this segment.

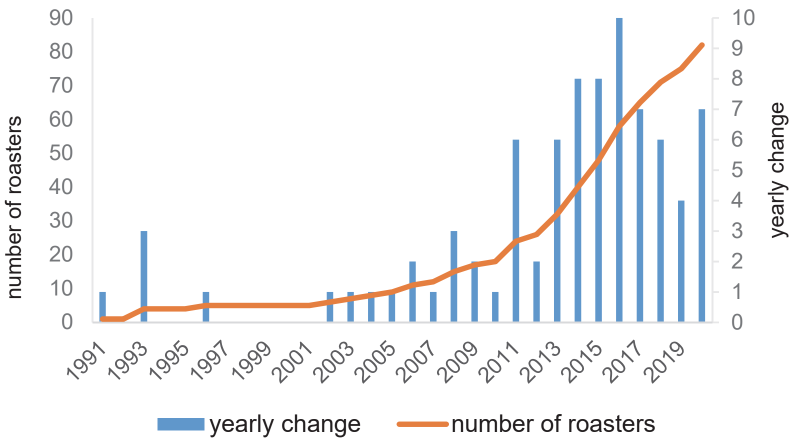

Fig. 1 Development small-scale local coffee roasters in Slovakia 1991-2020
Source: own research

Geographic structure of small coffee roasters

Although small-scale coffee roasters are key features of the recent developments in coffee culture, research devoted to this issue and its geographic aspects is very limited. Few studies examined coffee roasters, among them papers by Feuerstein (2002) and more recent study by Souza and Schiavi (2020) who investigated coffee roasters in the context of coffee commodity chain. Perhaps the only work concerning the development of small coffee roasters in Slovakia, mostly from business standpoint though, is dissertation by Glatzova (2017).

Over the past two decades, small coffee roasters have been on rise in Slovakia following the noticeable economic progress at the beginning of the first decade of 21st century. Precisely the disparities in economic conditions across regions seem to play an underlying role in the geographic distribution of third wave coffee roasters. As our data indicates, the spatial distribution of coffee roasters in Slovakia is uneven – more than a quarter of the small coffee roasters in our sample are concentrated in the Bratislava Region, 15 of them are located directly in the capital city which is more than total number of coffee roasters found in the eastern part of the country. The network of coffee roasters in Košice and Prešov Region combined is considerably sparser and the total number of them sums up to 14. The effect of high purchasing power in the capital Bratislava reaches beyond the borders of the city affecting the whole metropolitan area including the adjacent districts. The second highest number of third wave coffee roasters is found in the neighbouring Senec district (6) which equals to the total number of coffee roasters in Zilina Region.

To explain this spatial variation two factors have been considered – firstly, the time distance from a big city (given by the time distance from the nearest regional centre in minutes) and secondly, the level of economic development of region (considering two indicators: average monthly wage and unemployment rate).

Firstly, we examined distance of coffee roasters from the nearest regional centre. Almost half of small roasters (40) in our sample is located directly in a regional centre or within 25 minutes distance from the nearest regional centre, while less than a quarter of them is situated in distance of more than 40 minutes away (18). Even further from large regional centres, in distance of more than 70 minutes, only 3 roasters are located. The longest identified distance to the nearest regional centre was 75 minutes under ideal traffic has been found from roasters in Šahy and Liptovský Mikuláš.

The relationship of the localization of small coffee roasters and the distance from the nearest regional centre was represented by generated exponential function expressed in form $y = 120{,}37e^{-0{,}044x}$ (Fig. 2) which best fitted the observations. The coefficient of determination R^2 of these two variables takes value of 0,99 which proves that this function fits our data very well.

Our results are consistent with the findings of Cullen and Kingston (2009) who concluded that urban consumers are more open and receptive toward new food products and rate quality as the primary factor for product choice.

Although openness to novelty, emphasis on quality and experience are among the major drivers of alternative consumption, the primary constraint remains income. Literature suggests that higher-income households purchase high-quality products to larger extent (e. g. Broda and Romalis, 2009) which has major impact on geographical distribution of businesses offering premium products, small coffee roasters are no exception. It should be pointed out though, that small roasters are not solely dependent on sales in brick-and-mortar stores and coffeeshops, but significant proportion of their sales is executed through e-shops. The importance of e-commerce has grown significantly mainly recently as result of the impacts of the pandemic. Moreover, other noteworthy ways how the third wave coffee roasters reach their customers include distribution of packed roasted coffee and collaboration with coffeeshops and stores all over the country and abroad.

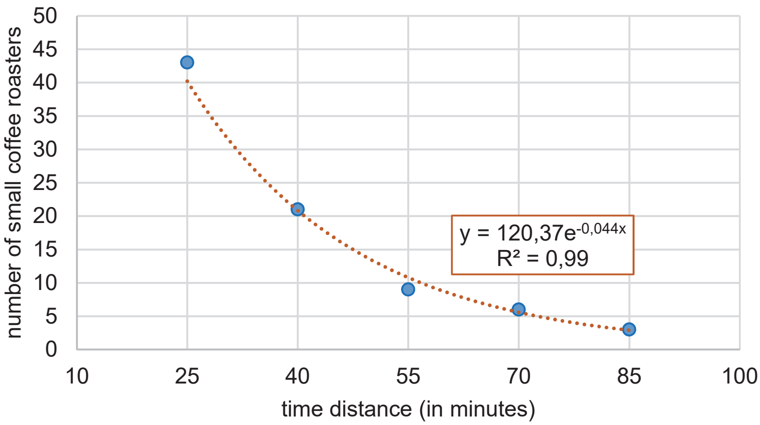

Fig. 2 Distance of small coffee roasters from the nearest regional centre in Slovakia (2020)

Source: own research

Despite that however, we found clear positive correlation between average monthly income and the number of small coffee roasters. Our findings are illustrated on Fig. 3, demonstrating the higher concentration of small roasters in high-income areas, primarily districts of the western part of the country. The largest number of roasters is found in Bratislava, where the wages levels reach maximum values in Slovakia, the average monthly wage in 2020 equalled 1647 euro (ŠÚ SR 2021a). Similar patterns are observable in the neighbouring districts Senec and Pezinok located within broader metropolitan area of Bratislava. The average monthly wage in both districts exceeds 1300 euro which translates into higher purchasing power creating a market for 2 and 6 coffee roasters in Pezinok and Senec districts respectively. Likewise, the second largest city and the centre of the eastern part of the country, Kosice, demonstrates relatively strong correlation between the number coffee roasters, above average incomes, and population. Our results are consistent with findings Cullen a Kingston (2009) who emphasized that the largest cities are the primary markets for novel products associated with alternative consumption (Križan et al. 2019). The concentration of small-scale premium coffee roasters in populous urban areas is apparent in the case of almost all other regional centres. A minimum of 2 coffee roasters can be found in each of the remaining regional centres including Trnava, Žilina, as well as Trenčín, Banská Bystrica and Nitra. Albeit not all the cities mentioned above are situated in particularly well-off regions, they serve as the economic centres within their respective areas, offering better paid occupations, thus, attracting workers from the adjacent rural areas. As Fig.3 illustrates, the regional centres stand out in terms of wage levels which contributes to formation of solid customer base for firms and entrepreneurs in various sectors.

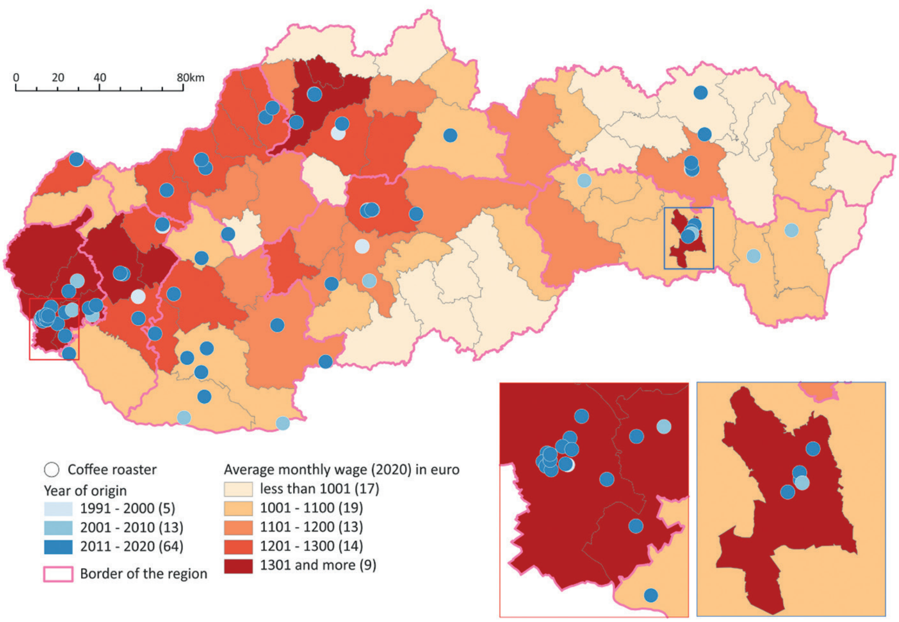

Fig. 3 Coffee roasters and average monthly wage (2020) in euro
Source: ŠÚ SR 2021a, own research

The evident effects of economic factors, however, does not relate only to the already discussed populous regional hubs, but applies to economically prosperous areas regardless of the size of the city. A denser concentration of the third wave coffee roasters is observable in a continuous band stretching from Zilina down to Komarno in a south-western direction which includes districts characterized by low levels of unemployment. Aside the already mentioned districts, a similar, noteworthy examples include Piešťany, Galanta and Šaľa where the number of small coffee roasters in each of the districts adds up to at least 2. These districts are characterized by relatively economically well-off population, unemployment levels below the 5% threshold which is noticeably below the nation-wide average equal to roughly 6,7 % (ŠÚ SR 2021b).

The opposite is the case for the peripheral lower-income areas with higher unemployment rates (mostly above 10%, ŠÚ SR 2021b), particularly those further from larger cities which are not an attractive location for coffee roasters. The map of the small coffee roasters in our sample is virtually blank in the southern part of Banská Bystrica Region, northmost areas and most of the Eastern Slovakia, where the third wave roasters could not find a sufficient consumer base. Bardejov and Spisska Nova Ves are rare exceptions attributable to tourism – the visitors might represent potential customers. Although tourists might be considered potential customers, their effect of spatial distribution of small coffee roasters is minor since a coffee roaster is rarely main reason for a visit of a particular place. Hence, it should not be considered a form of culinary tourism, like for example, a purchase of a local wine in the wine regions (Tej 2014). As Matlovičová and Pompura (2013) and Matlovičova et al. (2015) point out, one of the main characteristics of culinary tourism is that the choice of destination is determined primarily by the anticipated culinary experience.

CONCLUSIONS

The emerging subfield of geography of food and agricultural products has recently attracted a growing interest of geographers. Coffee is a particularly interesting food product for geographic research - behind our morning cup of coffee stands sophisticated global agro-industrial system comprising of a wide variety of players including family coffee farmers, processing and transport companies, roasters, and retailers (Vegro and Almeida, 2020). All these actors coordinate to satisfy increasingly demanding consumers who seek out more than an instant shot of energy. The habit of drinking coffee goes back centuries, through that time it has gained a firm place in our culture and become an integral part of our social lives. What's more, coffee choice has become a means of expression of individual's values, lifestyle, position within the socioeconomic hierarchy. In a similar manner, wider societal sentiments affect the overall coffee consumption patterns summarized into the three waves of coffee consumption.

The waves, however, had a later onset in the post-socialist countries compared to traditional industrialized economies that took the role of initiators in the coffee consumption trends. Bitter Robusta which had already long been out of fashion in North America and western Europe, were the only option for consumers in the former Soviet bloc until the fall of the Iron Curtain (Duszak, 2016). Democratization and economic liberalization allowed a rapid increase in coffee consumption. Multinational coffee chains did not wait too long to respond to the growing demand, entered the markets in CEE and introduced the second wave coffee. Simultaneously, the first small coffee roasters began to form incrementally initiating the third wave, however, starting off in only modest numbers. The segment did not experience marked growth in Slovakia until the beginning of the previous decade, following closely the path of economic development of the country. Similarly, the spatial socio-economic disparities have had crucial implications on the geographic distribution of the third wave coffee roasters. As we have shown, both unemployment rate and average income are good predictors of localization of the small coffee roasters. Our findings confirm that third wave coffee roasters remain emblematic primarily of economically prosperous urban areas, where majority of them concentrates. With a growing distance from a metropolitan area of a larger city, the number of small-scale coffee roasters falls more than proportionally.

Lastly, the third wave coffee roasters are not simply a distinct phenomenon relevant only to a narrow urban middle class and few coffee enthusiasts. Similar shift from conventional consumption to alternative products is observable in wide range industries and it is associated with growing incomes, liberal values, social and environmental awareness which has been on rise in the traditionally industrialized economies already for decades. In the post-socialist countries including Slovakia, these developments have become vital only recently and are still observable primarily in the affluent urban areas. Nonetheless, the sharp upsurge over the last decade and the upward trajectory of overall coffee consumption might be a reasonable indication of a potential for further growth. Although the consumption ceiling of the specialty coffee segment in Slovakia has not yet been reached, the recent developments pose significant bounds primarily on its short-term growth. The adverse economic effects of the pandemic are likely to weaken the demand for specialty coffee which has more elastic demand curve than conventional coffee - consumers are more responsive to changes in price. However, this is just a temporary disruption which will not affect significantly the long-term positive outlook.

Acknowledgement

This paper was prepared thanks to support provided within the VEGA grant No 1/0278/20 titled Governance, public finances and legitimacy of power at local level in the Slovak Republic.

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