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**A Qualitative Study Exploring Women's Empowerment  
in Coffee Cooperatives in Chiapas, Mexico**

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## ABSTRACT

This study presents findings from a qualitative research study conducted in Chiapas, Mexico that is one component of a larger activity funded by the Walmart Foundation and implemented by the International Food Policy Research Institute (IFPRI), titled Applying New Evidence for Women's Empowerment (ANEW). ANEW seeks to generate evidence from mixed-methods evaluations of women's empowerment in production and other entrepreneurial efforts at different nodes of agricultural value chains and aims to develop and validate measures of women's empowerment that focus on agricultural marketing and collective empowerment at the group level, both of which build upon the project-level Women's Empowerment in Agriculture Index for Market Inclusion (pro-WEAI+MI). In this report, we present findings of a qualitative study of coffee cooperatives supported by Root Capital in Chiapas, Mexico and how Root Capital engages with them to advance women's economic empowerment, among other objectives. As part of this study, we aimed to describe the gender dynamics and roles and responsibilities of men and women in the coffee value chain in Chiapas, and the opportunities and barriers faced as a result of these dynamics.

This study employed qualitative methods to collect primary data from types of respondents using individual and group interviews. Two coffee cooperatives in Chiapas that work with Root Capital were selected to participate in this study. From June to July 2023, 21 individual interviews and 9 group interviews were conducted with market actors, men and women coffee cooperative leaders, men and women cooperative members and their wives, and Root Capital staff from two municipalities in Chiapas. The data were transcribed into Spanish and then translated into English. These transcripts were analyzed using thematic analysis in NVivo software. A codebook inclusive of inductive and deductive themes was developed to guide the thematic analysis. This study design adhered to best practices for ethical research and received approval from IFPRI's IRB. Several limitations should be considered when reviewing the findings and conclusions of this study.

There exist defined gender roles and divisions of labor at each node of the coffee value chain in Chiapas, and participants often described these roles as expected given social norms or perceived gender-specific limitations of natural abilities that would shape how men or women could engage in different activities. Men and women indicated that while men are in charge of coffee production activities, women do spend time contributing to cleaning and management activities, and that women are heavily involved in the coffee harvest. Both men and women explained that women are responsible for processing activities, which can be time consuming and laborious, but often occur close to the home. Although the coffee harvest activities require physical labor in picking and carrying the baskets of ripened cherries, there is a perception that women cannot participate in other post-harvesting activities, such as transporting bags of coffee, because the lifting is too physically heavy of a task for women. Men are responsible for managing the sale of coffee and directly negotiating with the buyer to the extent that a negotiation happens. In instances when buyers travel to the household as the point of sale, women can participate in sales, typically facilitating the sale under the direction of her husband. However, women still do not lift the coffee bags nor transport the bags for sale. And many coffee producing households prefer to or sometimes need to hire labor to help with coffee harvest activities; they tend to hire men as laborers more out of preference or their availability compared to women.

Men and women interviewed for this study also described their perceptions and understanding of empowerment and elements of an empowered person with relation to engaging in the coffee value chain. Overall, while the concept of an empowered person was difficult for both men and women to relate to, they shared perceptions of how relations between men and women had changed over the years. Respecting women's rights or the perception of respecting women's rights was more acknowledged at the time of the interviews than in previous years, and it was more common to see men and women both generating incomes for the household. Men and women shared different perspectives regarding attitudes toward intimate partner violence, whereas both acknowledged men often mistreated their wives, but women discussed it as a private matter where men shared concerns over women's reaction to the

mistreatment rather than the mistreatment itself. Varying access to resources limited both men and women farmer's ability to advance in the coffee value chain, particularly access to credit, which was limited for both men and women in the study areas. Limited access to credit with favorable or reasonable terms limited men's and women's ability to hire additional labor on their coffee farm or to purchase machines that would reduce specifically women's time burdens within the household. Women's time use is constrained by expectations and normative tasks in ways that men are not constrained. Future research is needed and discussed to better understand these dynamics of gendered roles and relations and elements of empowerment in the coffee value chain in Chiapas.

Men and women members of the two respective cooperatives shared differences in how they were able to participate in and benefit from their participation in each cooperative. One cooperative provided more opportunities for members to directly engage in meetings, social activities, and capacity building opportunities whereas the other operated through a more decentralized structure and did not offer opportunities for members to directly participate in decision-making or meetings beyond the representation of their delegate. Members of both cooperatives perceived their cooperatives to be consistent and reliable coffee buyers offering stable prices. The former cooperative was also perceived as a source of support and community for members to advance their coffee production and post-harvesting activities. Both cooperatives also addressed key barriers faced by members, such as providing consistent and reliable pricing. Some members reported that cooperatives offered higher prices than those offered by non-cooperative buyers. Cooperatives also provided transportation options for producers to sell their coffee, which also enables women to have more engagement in coffee sales. However, normative barriers, such as women's existing time burdens and their need for their husbands' permission, limits women's full participation in the cooperatives.

Finally, we explored the extent to which Root Capital's engagement with the cooperatives had supported activities or changes that strengthen women's empowerment by understanding members and leaders' perceptions of this engagement. Overall, cooperative members were generally unaware of Root Capital and its engagement with the cooperative. Since Root Capital does not provide direct services to farmers or cooperative members, it was not surprising that many cooperative members were generally unaware of Root Capital and its engagement with the cooperative. However, a few were aware of Root Capital, knowing it had provided their cooperative a loan to purchase and maintain a truck, which was used to reduce barriers faced by producers to bring their coffee to the point of sale and had implications for shifting gender roles to manage coffee sales. Cooperative leaders reflected on the loan that facilitated increased transportation capacity, as well as other benefits from working with Root Capital. However, as Root Capital operates with a client-driven approach, adoption of the Gender Equity Advisory services was limited as these services only became recently available in 2021 and cooperatives opted not to prioritize these until 2023. Therefore, there was limited data to understand how these activities may be influencing cooperative operations, gender dynamics and roles, and perception of women engaged in the coffee value chain at the time of this study. We present several recommendations for areas of future research and considerations for Root Capital to strengthen its approach to gender equity programming.

**Keywords:** women's empowerment, coffee value chains, collective agency, Mexico, qualitative methods, pro-WEAI+MI

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## ACRONYMS

ANEW	Applying New Evidence for Women’s Empowerment
GBV	Gender-based Violence
GDP	Gross Domestic Product
GLI	Gender Lens Investing
GOM	Government of Mexico
IFPRI	International Food Policy Research Institution
ICO	International Coffee Organization
ILO	International Labor Organization
IRB	Institutional Review Board
pro-WEAI+MI	Project-level Women’s Empowerment in Agriculture Index + Market Inclusion
NGO	Nongovernmental organization
TOT	Training of Trainers
USDA	United States Department of Agriculture
WAI	Women in Agriculture Initiative
WEAI	Women’s Empowerment in Agriculture Index

## INTRODUCTION

This study presents findings from a qualitative research study to assess Root Capital’s approach in strengthening women’s empowerment by supporting coffee cooperatives in Chiapas, Mexico that is one component of a larger activity funded by the Walmart Foundation and implemented by the International Food Policy Research Institute (IFPRI). The project, titled Applying New Evidence for Women’s Empowerment (ANEW), seeks to generate evidence from mixed-methods evaluations of women’s empowerment in production and other entrepreneurial efforts at different nodes of agricultural value chains. ANEW is working with four programs implemented in India, Guatemala, and Mexico that are funded by the Walmart Foundation.<sup>1</sup> The ANEW portfolio aims to develop and validate measures of women’s empowerment that focus on agricultural marketing and collective empowerment at the group level, both of which build upon the project-level Women’s Empowerment in Agriculture Index for Market Inclusion (pro-WEAI+MI) (Malapit et al. 2023).

Root Capital is a non-profit organization that currently operates in 14 countries across Latin America, sub-Saharan Africa, and Southeast Asia.<sup>2</sup> Its mission is to invest “in the growth of agricultural enterprises that are building a more prosperous, inclusive, and resilient future for rural communities” by expanding access to finance coupled with customized technical advisory services on topics such as business management, governance, gender equity, agronomic capacity, among others. Root Capital partners with rural enterprises, i.e., cooperatives, to provide these services. In Chiapas, Root Capital has partnered with and supported over 110 cooperatives with credit and advisory services since 2008. In 2023, Root Capital partnered with 21 cooperatives to provide Advisory services, while eight cooperative partners receive lending services and tailored Gender Equity Advisory services with the ultimate objective of strengthening the wellbeing and resilience of rural communities. Supporting women is an

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<sup>1</sup> See <https://www.ifpri.org/project/applying-new-evidence-womens-empowerment-anew> for more information about the ANEW portfolio.

<sup>2</sup> See <https://rootcapital.org/> for more information about Root Capital.

important focus of Root Capital's work, and it operates through a range of programs including grants, gender lens investing, and Gender Equity Advisory Services.

As part of the ANEW portfolio, this study aims to investigate Root Capital's technical and advisory services provided to coffee cooperatives in Chiapas, Mexico, with an interest in understanding how these services strengthen women's participation, benefits, and empowerment from engagement in the coffee value chain and the coffee cooperatives. This study employs qualitative methods and uses data collection protocols developed as part of the pro-WEAI+MI, including a community profile exercise, individual interviews, and group interviews. Key stakeholder groups included in this study include Root Capital staff, local market actors involved in the coffee value chain, cooperative leaders, men and women cooperative members, and wives of cooperative members. The following research questions and sub-questions guide this study:

1. What are the perspectives of agricultural cooperative members and program implementors on Root Capital's intervention and support?
  - a. How is the Root Capital intervention affecting women's livelihoods across value chain nodes and providing opportunities for women to empower themselves?
  - b. Which aspects of the program were considered successful and which aspects of the program should be improved upon?
2. How do men and women in the coffee value chain experience (and understand) empowerment and disempowerment?
  - a. How can men's and women's experiences and perspectives inform the measurement of empowerment among those operating in agricultural value chains? (e.g., is there a need for new indicators in the pro-WEAI+MI or do existing indicators need refinement)
  - b. What are the key gender dynamics that shape men's and women's ability to engage with different nodes in the coffee value chain?
3. How did Root Capital's intervention affect farmer organizations?
  - a. What were the benefits for men and women members?

- b. Were there any negative consequences for men and women members?
- c. How did the project lead to changes in cooperative functioning and the cooperative's collective efficacy?

### **Structure of the report**

Following this brief introduction to Root Capital and the Mexican coffee sector, including some aspects of how women and men participate in the coffee value chain, the report is organized as follows. Section 2 describes the methods employed to answer the research questions, including a description of the training and research team, individual data collection methods, sampling approach, analysis, data management, and ethics. It also covers study limitations that should be considered when reviewing the findings and discussion. Section 3 presents the study results, organized around the main topics presented in the three research questions. Section 4 presents a discussion of the findings, as well as a conclusion with recommendations and areas for consideration for both Root Capital, donors, and other relevant stakeholders.

### **Background on Root Capital**

Root Capital is a global nonprofit organization that aims to strengthen existing agricultural enterprises and cooperatives by providing tailored advisory services and access to finance with the goal to “reimagine rural resilience.” Root Capital operates in 14 countries across Central and Latin America, Africa south of the Sahara, and Southeast Asia. Their mission is to “grow rural prosperity and build the resilience of farming families around the world.”<sup>3</sup> Root Capital’s global framework focuses their work along four impact pathways, according to the 2021-2025 Strategy: 1) Access to Finance, 2) Climate Action, 3) Gender Equity, and 4) Next Generation Jobs. Root Capital partners with rural, agricultural enterprises (i.e., their clients) to work together to identify solutions to improve the enterprises’ operations and growth through a diagnostic process, from which they design tailored service to meet their clients’ needs and strengthen rural resilience.

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<sup>3</sup> To learn more about Root Capital’s overall approach and operations, see: <https://rootcapital.org/>

These specific services include technical advisories (including business operations and management, gender equity, and agriculture) and lending services. Root Capital’s intervention model provides services and financing options directly at the enterprise or cooperative level only; they do not deliver interventions or assistance at the farmer level. Root Capital employs a client-led approach, which means that while there are incentives to encourage adoption or uptake of offered services, ultimately the decision rests with the cooperatives.

For its Advisory services, in each region, local Root Capital staff identify potential clients by either convening a workshop to promote Root Capital’s services or by directly contacting potential cooperatives with whom they could work. Once potential clients are identified, Root Capital staff conduct an Agribusiness Digital Diagnostic to identify areas for strengthening and to tailor their advisory or lending services to suit client needs. Several of the diagnostic questions are focused on gender inclusion. When reviewing results, Root Capital places a quarter of their score on gender inclusion indicators. Once an enterprise becomes a client, Root Capital staff use their “credit plus capacity” model to tailor services to their client’s needs. This model couples credit options with capacity building services to address areas of improvement and ultimately strengthen the clients’ capacity for sustained growth. In Mexico and Central America, Root Capital Advisory services has reached 144 clients in 2023. In Chiapas, Mexico, where this study concentrates, Root Capital has 21 clients who received advisory services and eight clients who received Gender Equity Advisory services, all of which are coffee cooperatives.

As part of their four thematic areas, Root Capital seeks to address gender equity in their work through multiple channels. According to their website, globally, Root Capital has reached over 581,000 women farmers since 2012 and disbursed over \$92 million USD to gender-inclusive and women-led clients in 2022 alone.<sup>4</sup> In 2012, Root Capital established the Women in Agriculture Initiative (WAI) to consolidate work addressing gender across teams into one program. Through the WAI, Root Capital has launched several programs and initiatives to strengthen their gender equity work, including Gender Equity Grants,

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<sup>4</sup> <https://rootcapital.org/our-impact/#Gender>

an initiative to strengthen gender lens investing (GLI), and establishing formal Gender Equity Advisory services.

In 2016, under the WAI, Root Capital initially launched the Gender Equity Grants to provide clients funding to “improve gender inclusion within their operations and communities – specifically by supplementing the initial costs and risks for a business to implement gender-inclusive policies and programs” (Value for Women, 2021, 4). In 2019, Root Capital launched the Gender Equity Grants in Mexico and Central America, which included a focus on climate resilience. Clients are invited to apply for Gender Equity Grants of up to US\$20,000 based on several criteria, which include their credit performance, advisory service relationship, and their need, interest, and commitment to gender inclusion and to improve policies and practices that strengthen gender equity within the cooperative (Value for Women, 2021). Examples of such strategies across the areas in which Root Capital provides these grants include creating a daycare center to support families in which both parents work; implementing trainings focusing on off-farm skills for income generation; providing a collection center more central in the communities to reduce farmers’ need to travel to deliver harvests and thus reducing their risk of exposure to violence. Although these grants have been implemented in Chiapas since 2019, neither of the cooperatives selected for this study had received one.

In 2021, with support from the Walmart Foundation, Root Capital launched a new GLI initiative in Central America and Mexico to provide credit options to women-led and gender-inclusive businesses at an early stage. Through this initiative, Root Capital is targeted to disburse an additional US\$25 million of investor capital to early-stage women-led and gender-inclusive businesses in a way that absorbs the operational costs and risks associated with financing early-stage businesses that need smaller loans (Root Capital, 2021a). Finally, Root Capital has recently established Gender Equity Advisory Services as part of the suite of advisory services staff offer to clients to strengthen clients’ policies and practices for addressing gender equity. While local staff have always offered similar types of services, the Gender Equity Advisory Services were piloted first in Indonesia in 2021. These formal Gender Equity Advisory Services officially

started in Chiapas in November of 2021. Globally, in 2021, Root Capital provided Gender Equity Advisory services to 20 clients globally and intends to reach 103 clients by 2025 (Root Capital, 2021b).

## **Mexican coffee sector and gender dimensions of coffee value chains**

### ***Coffee sector in Mexico***

Mexico is among the top 10 global coffee producers, accounting for approximately two percent of global production in 2023 (Otero, 2023). Unlike neighboring Mesoamerican countries, coffee does not account for a significant value of Mexico's GDP, amounting to only 0.1 percent of the value of all exports (World Coffee Research, n.d.). However, export volumes have been slightly increasing since 2020 as have intentional efforts by the Mexican government to improve Mexican coffee production (International Coffee Organization, 2022). Most Mexican coffee producers (90 percent) are small-scale, cultivating two hectares or less of coffee. The leading variety of coffee produced in Mexico is shade-grown *arabica* and Mexico is a leading global producer of shade-grown and organic coffee worldwide, although the leading variety grown in Chiapas is *robusta*, which is more resistant to pests and requires lower maintenance than *arabica*. Fourteen states within Mexico, mostly concentrated in the central and southern areas, produce coffee. Chiapas is the leading producer (39 percent of national production), followed by Veracruz (24 percent) and Puebla (17 percent). In Chiapas, there are approximately 400 coffee cooperatives and over 178,000 smallholder producers operating on three hectares or less (Otero, 2023).

The Mexican coffee sector generally is limited by several challenges, namely insufficient investment and government support, labor shortages, variable weather patterns and climate change, and low productivity. Public-private partnerships have been instrumental in mitigating the spread of coffee leaf rust disease and increasing productivity, but these partnerships have recently lost funding and effectiveness. Recent private investments in the coffee sector have focused on strengthening extension services, however the reach of these services is limited as 95 percent of producers in Mexico are smallholders, meaning each extension agent has a high number of farmers to work with and less time to devote to each farmer, effectively limiting the effectiveness of services provided. While the Government

of Mexico (GOM) has implemented two major assistance programs for coffee producers, producer associations have indicated this support is insufficient to significantly impact coffee producers or the sector at large. These programs include the Production for Wellbeing Program that delivers an annual cash transfer of 6,200 pesos<sup>5</sup> to nearly 220,000 producers, and *Sembrando Vida* (Sowing Life) that delivers monthly cash transfers of 6,000 pesos<sup>6</sup> to smallholder producers to promote the ancient *milpa*<sup>7</sup> production system. Approximately 6,000 coffee producers are enrolled in this program, and since 2019, it has reportedly supported the planting of 100 million new coffee plants (Otero, 2023).

Additional challenges include field labor shortages that limit smallholder farms' ability to harvest. Specifically, due to new GOM policies and actions, fewer seasonal workers, mostly from Central America, travel to southern Mexico for agricultural work, and the tourism industry competes for labor, paying substantially higher wages (Otero, 2023). Climate-induced migration also reduces the number of skilled farmers available to manage and work on coffee farms, further reducing available labor (Ruiz-de-Oña et al. 2019).

Variable weather patterns and shifts due to climate change have negatively affected the coffee sector in Mexico. In February 2023, for example, short heat waves accelerated coffee cherry maturation and farmers were unable to find labor to harvest earlier than planned, thus resulting in loss of productivity. Hurricanes and other intense weather patterns have caused damage to local infrastructure and damaged crops. Additionally, certain pests, such as the coffee berry borer, and diseases, like coffee leaf rust, have had less impact on the sector recently as producers increasingly plant resistant varieties, and improve their application of management and prevention practices on farms (Otero, 2023).

For smallholder coffee farmers, these challenges can be exacerbated depending on the marketing system in which they operate: whether through fair trade networks, vertical integration, or what has been the “conventional” commercial system of non-affiliated growers. Based on mixed-methods research in

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<sup>5</sup> Approximately USD \$364 as of August 2023.

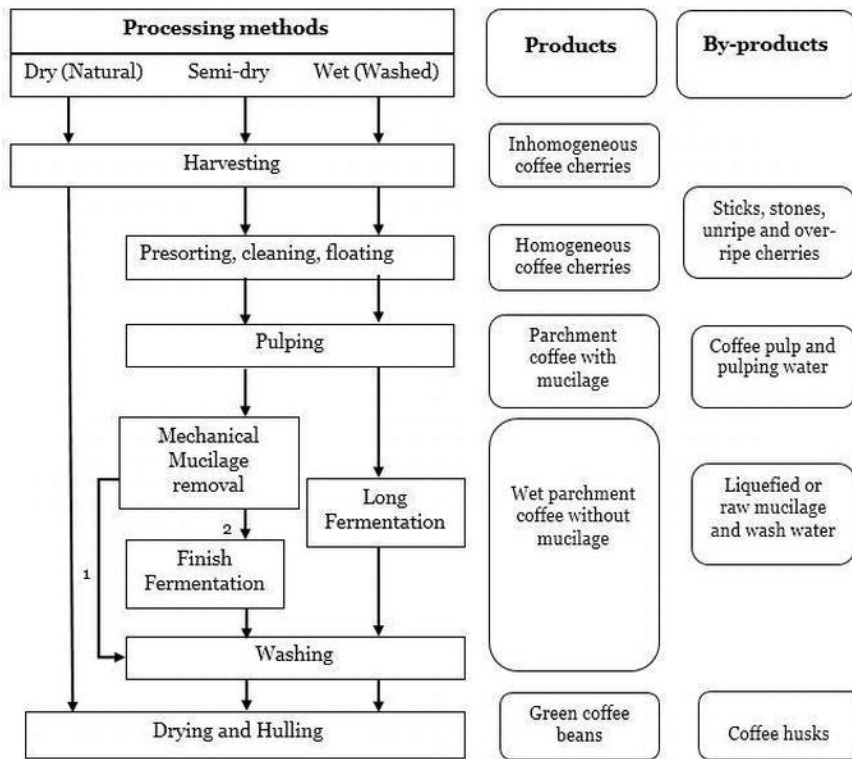
<sup>6</sup> Approximately USD \$352 as of August 2023.

<sup>7</sup> The *milpa* production system stems from ancient Mesoamerica that combines a high diversity of crops and trees to promote high production and household consumption of healthy foods. See Fonteyne et al. 2023 about the *milpa* system.

Chiapas, Luna and Wilson (2015) found that smallholders experience constraints to credit, technology, and market information while also working on poor quality land that is located far from markets. Additionally, they face market requirements of meeting quality standards and product quantities on a regular schedule. While coffee prices can compensate for the costs of these challenges, Luna and Wilson (2015) found that in Chiapas, the way that smallholders integrated into the coffee chain also affected their profitability. For example, producer associations that can demonstrate that their members use “safe and sustainable” agricultural and environmental practices that conform to International Labor Organization (ILO) labor conventions, and that have “democratic structures and transparent administrations” are able to receive price premiums for their certified coffee. However, assessments of fair-trade benefits for smallholders have been mixed, and its percentage of market share remains small.

Post-harvest processing (e.g., roasting and grinding, packaging, and retailing) provides the largest portion of value addition in the coffee value chain, and this usually occurs off farm and closer to the countries in the global north that, other than Brazil, are the largest consumers of coffee. Figure 1.1 presents an overview of the multiple channels in which one can process coffee post-harvest and the steps involved in each.

**Figure 1.1 Overview of coffee post-harvest processing**



Source: Haile and Kang, 2019.

Thus, increasing how much of this processing work can be done through “vertically integrated” producer associations can help to capture a larger share of the profits (Luna and Wilson, 2015). The non-affiliated farmers sell to independent traders who either do some processing themselves or sell to other firms to handle the post-harvest processes. The benefit to the farmers is that they receive credit during the growing season and are paid in full at the farm gate, even if prices are lower than through the cooperatives (Luna and Wilson, 2015). Luna and Wilson (2015) identified differences in the household demographics and structures as well as in the crop choices of farmers in these three categories, although these variables did not significantly affect the prices received for coffee. More important were factors such as off-farm income, which sometimes drew labor away from maintaining coffee trees with a negative effect on coffee quality, thus lowering the price received at harvest. However, no off-farm income also increases risks in a bad season. The study concluded that in most cases, producers who are cooperative members benefit from

higher prices and as well as services including “technical/managerial training and classes on how to compete in a consumer-oriented, global market” (Luna and Wilson, 2015: 100).

In Chiapas, small-scale coffee producers typically sell their coffee to cooperatives or “coyotes”, which is a Central American term for an independent, local buyer. Typically, cooperatives offer a range of services and support to members and often times include members in decision-making through various representative structures (i.e., through representative delegations or via individual voting processes). Certain cooperatives only operate as a buyer, where members sell their beans to the cooperative for a secure price, whereas other cooperatives may offer additional services beyond a secure price, such as facilitating transport to pick up harvests at the farm-gate or providing training or technical assistance services. In Chiapas, many cooperatives also require members to follow strict organic guidelines and offer a premium price to purchase organic coffee from their members (Milford, 2014; Padron et al. 2012).

### ***Gender dimensions of the coffee value chain***

Globally, women’s participation in coffee production is increasingly recognized, with estimates that up to 70 percent of coffee production labor is provided by women (International Coffee Organization 2018). These figures are estimated to vary by production activity and region. There is more systematic evidence cataloging gender roles in the coffee sector in Africa (ICO 2018). There is limited evidence and research exploring and cataloging gender roles and elements of women’s empowerment in the coffee sector in Latin America, and specifically, in Chiapas, Mexico (ICO 2018). We present a summary of the literature that does explore these topics in Mexico and pull in insights from a documentary focused on gender roles in the coffee sector in Chiapas.

Lyon et al. (2017) found that women coffee producers in Oaxaca who participated in coffee producer associations reported higher levels of household decision-making power and were more likely than men members to report control over their coffee income. However, they also reported that they experienced exacerbated time poverty from their time spent in coffee production, association membership, and in fulfilling domestic duties. The higher levels of time poverty experienced by women

members were a significant factor in limiting women's ability to fully benefit from their membership, to participate at similar rates to men, or to assume leadership roles in the association (Lyon et al. 2017).

In an analysis of smart-economic "women coffee farmer" discourse, Lyon et al. (2019) observe that,

Even though the woman coffee farmer lacks, in comparison to her male counterparts, access to agricultural resources and credit, she is consistently able to produce high-quality coffee deserving recognition. Viewed as an efficient worker who produces high-quality coffee and invests her profits in her household's well-being and children's future, the woman coffee farmer is thus an ideal target for smart economics–inspired women's coffee programs (2019, 36).

The documentary "Gender in Coffee," filmed in Chiapas by Xavier Hamon and Hannah Stapleton, which was first shown in 2018, gives a visual representation of the discussion above, with some interesting similarities and some differences. The focus of the film is on the meaning of gender equity in coffee production families and associations, and it supplements the relatively thin literature on coffee-producing households in Chiapas.

According to the most recent Global Gender Gap Report, in Mexico women and daughters have gained near equal rights to men and sons for inheritance, access to land assets, and access to non-land assets, and are said to have equal rights to access financial services (WEF, 2023: 260). For instance, the agrarian reform law ('Ley de Reforma Agraria' of 1971) established that women could inherit land, but this was contingent upon their husband's agreement (Bustamante-Olivera et al., 2018:18); it also officially recognized gender-equal decision-making rights over land (García-Morán and Yates, 2022). However, in practice, customary laws and social norms shape the ways in which women may access these rights. As described by García-Morán and Yates (2022), "women [in Mexico] struggle to translate legal land rights into practical land use and control due to masculinized *ejido*<sup>8</sup> land management". In Hamon's

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<sup>8</sup> *Ejido* is a land tenure system in Mexico that was established post the Mexican Revolution (1910-1924) that gives joint

and Stapleton's documentary, one woman in Chiapas emphasized that her land is central to her ability to progress in life, as her one hectare of coffee qualified her to become a member of the cooperative, after which she became a representative and later a board member.

Issues of intimate partner violence and other forms of gender-based violence also affect women in Mexico and in Chiapas. Aguerrebere et al. (2021) observed that unequal gender norms in Chiapas, particularly those that dictate expectations for how women should spend their time and limit their ability to leave the household unaccompanied can "limit women's access to financial resources, promote social isolation and constrict women's social networks, leaving them with little support to cope ... as well as leave a violent relationship" (2). According to UN Women's Global Database on Violence against Women, approximately 24.6% of women aged 15-49 years in Mexico have ever experienced intimate partner violence (physical or sexual) at least once in their lifetime (INMUJERES and INEGI, 2016). And indeed, there are limited services available to support these women in Chiapas and those that are available are often insufficient to comprehensively meet their needs (Aguerebere et al. 2021).

In rural areas, labor is often segregated by gender as men and women are normatively expected to perform different tasks (Lyon et al. 2017). Yet both the men and women in Hamon and Stapleton's 2018 documentary stress that "coffee is a lot of work," that depends on care of both the household and the farm by the family together. Women spend long days caring for their families while also tending to the business of caring for their coffee plants, picking the cherries, and drying them. Many of the men and women in the film talk about their individual and their shared responsibilities for their coffee and their household.

The discussions presented in the documentary around household income stress joint decision-making. One husband explains, "She brings her own bags of coffee, but we almost don't touch her money because to whom do the children ask from the most? In whom do they have more trust? In the mom, right?" Another husband says, "She harvests her own coffee. We separate it, her coffee bags and my

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ownership over communal land and legal individual usage of land, often for household or agricultural purposes. To understand more, see García-Morán and Yates (2022).

coffee bags. And with the money from the coffee that we harvested, we combine it and say, ‘what are we going to buy?’” Even the woman who says that it is the men who “bring the income,” adds that they decide together on how to spend it.

The reflections of several interviewees in the documentary about how their lives are different from those of their parents is also of interest, as they note the negative consequences of their fathers’ violence towards their mothers and compare them to their own. The next generation is reported to desire more equal relationships between husbands and wives, where women are valued and appreciated, and for their children to gain an education that would provide a better life.

The film also documents the efforts of one cooperative, Procafem, to support trainings on gender equity as part of their programming that are open to both women and men (Hamon and Stapleton 2018). One leader who is quoted in the film says:

What we are trying to do here at Procafem so that we have gender equity is to have talks with men, go to the community and explain to them what gender equity means and empower women. But mainly, we have to talk to men, and not only adult men but we also have to help young men, too, so they can learn and see that everyone is equal at home.

## **METHODS**

### **Training and the qualitative research team**

A training for the qualitative interviewers was held in San Cristobal de Las Casas, Chiapas from June 19 to June 23, 2023. The training covered background information on the pro-WEAI+MI, ANEW portfolio, and key concepts related to the study such as gender dynamics in agricultural value chains, different types of agency, empowerment, and specifics on the coffee value chain. Additionally, the training covered best practices and ethics in qualitative research. The field team included two anthropologists, one man and one woman, who had qualitative research experience in Mexico and are native Spanish speakers. The instruments were piloted with cooperative members with a similar profile to those sampled for this study. The facilitation team refined the interview questions based on feedback from the pilot exercise.

### **Qualitative methods**

This study employed three different types of qualitative methods: a community profile exercise, individual interviews, and group interviews. First, a community profile exercise was completed for each of the two municipalities. The exercise covered questions relating to the general community and availability of key resources and infrastructure, such as types of electricity used and locations and availability of schools. These questions were posed to different members of the respective municipalities to capture a broad profile of the two different areas in which the study was implemented.

Second, the study employed individual and group interviews with participants of different profiles. These interviews followed a semi-structured and open-ended approach. Scripted probes were included to deepen the interviews with participants. Individual interviews were conducted with the following respondent profiles: local market actors, cooperative leaders, and Root Capital staff. Local market actors included local coffee traders, input suppliers, and credit providers with whom the cooperative members would have engaged within the local coffee value chain. Cooperative leaders were identified as those who were in a position to make decisions on behalf of the cooperative. And Root Capital staff included those who either managed the overall operations for coordinating advisory and technical services to cooperatives

in the region or were technical or loan officers who engaged directly with the cooperatives in Chiapas. Finally, group interviews were conducted with men and women cooperative members, as well as wives of cooperative members.

The interview guides were tailored to each of the different respondent profiles. In general, all interviewed covered topics around understanding and perceptions of empowerment, gender relations in the coffee value chain and within the cooperative, cooperative operations and dynamics, engagement with Root Capital advisory and technical services, and access to necessary resources, including credit options. Each of the interview guides was designed to gather the nuances between value chain nodes and men and women in these coffee cooperatives in Chiapas. All the interviews were conducted in Spanish. The final interview guides are available in both English and Spanish upon request from the authors.

## **Sampling**

### ***Study area***

Root Capital’s Gender Equity Advisory services supports eight coffee cooperatives across Chiapas. Selecting which cooperatives to include in this study was complicated by security challenges, a willingness of the cooperatives to participate, and their availability. Per the recommendation of Root Capital partners, two cooperatives were selected to participate in the study. Data collection occurred from late June to early July 2023 in two municipalities northeast of San Cristobal de las Casas. Table 2.1 presents a description of the two cooperatives selected to participate in this study.

**Table 2.1 Description of study area and selected cooperatives**

<b>Cooperative</b>	<b>Municipality</b>	<b>Percentage of women and men members</b>	
		<b>Men</b>	<b>Women</b>
Cooperative 1	MP1	71%	29%
Cooperative 2	MP2	84%	16%

### ***Participant Selection***

Participants were purposively selected to participate in this study based on their role either as a Root Capital staff member, an actor in the local coffee value chain, or as a leader or member of either

cooperative 1 or 2. Several Root Capital staff based in San Cristobal de las Casas were selected for this study based on their role overseeing support services to cooperatives in Chiapas or delivering technical or financial support to cooperatives. An additional staff member was interviewed remotely based on their role advising on women's empowerment and gender initiatives. A total of six Root Capital staff were interviewed for this study.

Local market actors were identified as those with whom the cooperative members engage in the community to produce, process, or sell their coffee. These actors included local coffee traders, local formal credit providers, or agro-input suppliers. No women market actors were identified in the communities, and thus none were interviewed for this study.

Finally, in each cooperative, three categories of respondents were identified to participate. First, cooperative leaders, defined as those who make decisions on behalf of the cooperative, were invited to participate in an individual interview. Second, cooperative members, defined as those who are registered members of the cooperative and who participate in and receive services from the cooperative, were invited to participate in group interviews. Group interviews were held with men members and women members separately. Finally, wives of cooperative members of the respective cooperatives were invited to participate in a group interview. Members and leaders were identified and invited to participate based on their willingness and availability, and their ability to speak Spanish. Table 2.2 presents the total sample by respondent profile, gender, and municipality.

**Table 2.2 Respondent sample by profile, gender, and municipality**

Respondent Profile	San Cristóbal de las Casas		MP2		MP1	
	Men	Women	Men	Women	Men	Women
Individual Interviews						
Root Capital staff	3	3	0	0	1	0
Local credit providers	0	0	0	0	1	0
Local coffee traders	0	0	2	0	2	0
Agro-input suppliers	0	0	2	0	2	0
Cooperative leaders	0	0	1	1	2	1
Cooperative member	0	0	0	0	0	1*
<b>Total</b>	<b>3</b>	<b>3</b>	<b>5</b>	<b>1</b>	<b>7</b>	<b>2</b>
Group Interviews						
Cooperative members	0	0	2	2	1	1
Wives of cooperative members	0	0	0	2	0	1
<b>Total</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>4</b>	<b>1</b>	<b>2</b>

Note: Local credit providers in MP2 were not identified to participate. Women market actors were not identified to participate in this study in either municipality. San Cristóbal de las Casas is the location of Root Capital's office in Chiapas and from where the local staff operate.

\*One woman was not able to participate in the group interview but participated in an individual interview.

### Data collection, management, and analysis

The research team conducted 21 total individual interviews and 9 total group interviews from June to July 2023. Fifteen individual interviews were conducted in-person and six were carried out remotely via Zoom, depending on the participant's preference. All group interviews were conducted in person. Upon receiving informed consent, all interviews were audio recorded, except one interview where consent was not provided. This participant was not comfortable with having their responses recorded. The audio recordings were transcribed verbatim into Spanish by an external transcription team and then were translated into English by another translation team. For the interview that was not audio recorded, the interviewer took detailed notes and submitted those as raw data to be analyzed. Two authors reviewed the transcripts for accuracy and completeness. All transcripts were used in the analysis. The lead author developed a codebook with deductive and inductive themes to guide the thematic analysis of the qualitative data. One author coded all transcripts using the agreed upon codebook and used NVivo software to complete the thematic analysis.

## **Limitations**

The study design and implementation faced a few limitations. First, certain profiles of target participants either did not exist in the municipalities or were unavailable to participate in this study. Specifically, no women market actors were identified to participate in either municipality. In MP2, credit providers did not exist and only one credit provider existed in MP1. Additionally, certain research participants did not share all demographic data asked, which led to some gaps in the description of the total sample. Second, due to budgetary and timeline constraints, this study did not include a control group from which to compare results gathered from interviews with the Root Capital supported cooperatives. Finally, the sample was intended to be restricted to only those who spoke or understood Spanish, which we acknowledge may have excluded potential participants who did not have sufficient skills in Spanish, and those who participated may not have been the most comfortable speaking in Spanish, which may have influenced the extent to which they could describe their responses. Overall, this study includes a small number of respondents representing different stakeholder categories from who we triangulate responses to inform our overall findings and discussions of the topics presented.

## **Ethics**

This study was approved by IFPRI's Institutional Review Board (IRB). Per the International Research Ethics Review Board in Mexico, this study did not require approval from an in-country entity. Neither of the cooperatives included in this study were part of indigenous communities, which require specific permissions to enter. Both interviewers received training on research ethics and the process for seeking informed consent to participate in the data collection activities as well as to have their interviews audio recorded. Prior to beginning an interview, the researchers read a prepared statement of voluntary consent to participate in the interview and to record the interview. All participants provided oral consent to participate in interviews, and all participants except one provided oral consent to record the interview. According to local best practices, participants did not receive incentives or gifts for their participation.

## RESULTS

### Description of study areas and participants

#### *Descriptions of the two municipalities*

At the end of interviews, the participants were asked several questions as part of a community profile exercise to describe their municipalities. This section presents the results of those responses. This study took place in two municipalities in Chiapas. MP1 is considerably larger than MP2 in terms of population, with an estimated 35,000 to 40,000 residents compared to just over 1,000 in MP2. In both municipalities, Spanish is widely spoken. In MP2, most people also speak Tzeltal whereas in MP1, most people speak both Chol and Tzeltal.

Both municipalities are known for their coffee production. In MP2, the main agricultural activities are solely focused on crop production (coffee, corn, beans, squash, and peanut), whereas in MP1, the main activities include coffee production, small-scale cattle raising, and beekeeping. Women tend to be involved in coffee production as their primary economic activity in both municipalities, whereas men are more involved in both coffee and other crop production. In both municipalities, it is common for men to migrate to the United States and send remittances as a key source of income. High value jobs for women include those with the government or as a bilingual (Spanish and Chol/Tzeltal) teacher.

Both municipalities have similar access to and quality of transportation and communication infrastructure. However, certain services tend to be more spread out in MP2 compared to MP1. For example, financial services, such as brick and mortar banks are not as available in MP2 compared to MP1. In MP2, the closest bank is in San Cristobal de las Casas, which can be up to an hour drive. In MP1, there are banks available in the main communities, but these can sometimes be up to a half hour drive depending on where people live. There are large food markets located in the main communities of each municipality. Available payment options for coffee producers differ between the two areas. In MP2,

merchants prefer cash payments whereas merchants are more flexible in MP1 and accept direct deposits in addition to cash.

Respondents indicated that women who have a better social standing tend to be those who work in “esteemed positions,” such as a teacher or for the government or operating her own business. “Esteemed women” are also those married to a man who is important in the community. In both municipalities, women tended to marry younger than men.

### *Description of study participants*

Table 3.1 presents the description of the cooperative members and members’ wives who participated in group interviews in both municipalities. In MP1, seven men cooperative members participated in a group interview, eight women cooperative members participated in a group interview, and six cooperative members’ wives participated in a group interview. In MP2, nine men cooperative members participated in two group interviews, twelve women cooperative members participated in two group interviews, and twelve cooperative members’ wives participated in two group interviews. Men cooperative members, on average, were older than both women cooperative members and the wives of cooperative members, although missing data may have skewed these averages. None of these participants were divorced. A few women cooperatives members were single, whereas the rest of the sample were either married, in an informal union (“common law spouse”) or were widowed.

**Table 3.1 Description of cooperative members and wives of members**

	Cooperative members		Cooperative members' wives
	Men	Women	
MP2	9	12	12
MP1	7	8	6
Marital status <sup>1</sup>			
Single	0	18%	0
Widow(er)	0	12%	22%
Married	92%	47%	64%
Divorced	0	0	0
Informal union	8%	23%	14%
Age <sup>2</sup> (mean in years)	50	34	41

<sup>1</sup>There were missing data for 3 men FPO members, 3 FPO women members, and 4 wives of cooperative members.

<sup>2</sup>There were missing data for 3 men FPO members, 3 FPO women members, and 3 wives of cooperative members.

Table 3.2 presents the description of cooperative leaders and market actors that were interviewed as part of this study. As noted in the limitations section, only men market actors were identified in both municipalities to participate in this study and therefore, no women market actors are included. On average, the agro-input suppliers were younger than both the cooperative leaders and coffee traders interviewed for this study and the cooperative leaders and coffee traders have been in their respective positions longer than the Root Capital staff. Missing data, however, may have likely skewed these averages. Of the Root Capital staff that provided this specific data point, they had been in their positions between two and seven years.

**Table 3.2 Description of cooperative leaders and market actors**

	Root Capital staff	Cooperative leaders	Market actors		
			Credit providers	Agro-Input suppliers	Coffee traders
Men	3	3	1	4	4
Women	3	2	0	0	0
MP2		2	0	2	2
MP1		3	1	2	2
Average age	*	45.2	*	36.75	49.25
Average years in position <sup>1</sup>	3	8.75	*	*	12.5

\*These respondents were either not asked this data point or declined to provide.

<sup>1</sup>There were missing data for 3 Root Capital staff; 1 FPO leader; and 2 coffee traders.

### **Gender and women’s empowerment in coffee value chain in Chiapas**

Respondents engaged in the coffee value chain described gender roles and division of labor at each node of the value chain in Chiapas. Research participants often describe these roles as expected given social norms or perceived gender-specific limitations of natural abilities that would shape how men or women can engage in different activities. The findings from this study mirror those already discussed in the literature to the extent that women’s membership in cooperatives may contribute to existing time burdens and similarly may be limited by existing time burdens (Lyon et al. 2017). However, this study contributes to the literature in presenting the ways in which men and women participate in each node of the coffee value chain in Chiapas. Such descriptions are presented in this section by value chain node.

#### ***Production***

Men and women describe that within households both are heavily engaged in coffee production. Women typically provide labor on their husband’s (also referred to as the “family”) coffee plot. However, men are considered “in charge” of household coffee production. Specifically, while men manage and are engaged in all coffee production activities, women are primarily involved during the harvesting period. A coffee trader observed that during the harvest season, “At 6:30AM, [women in my community] are already in

their coffee plantations...I have seen the women, they come with their bags of coffee, coming out on the road, walking [and] carrying their coffee” [Coffee Trader, MP2, Man]. Another man further explained, “The women only come when there is a harvest. Right now, there are only men, it is us. We are cleaning the coffee bushes [such as pruning or maintenance activities], the woman will not go [to the farm for this]” [Men, Members, MP1]. Often, participants explained that women are not as engaged in production activities “because [the work] requires heavy lifting and we do not include women” [Coffee trader, MP2, Man]. However, a woman producer from MP2 explained that while typically women are not as engaged in certain activities, women can be, particularly if they are managing their own coffee plot,

No other women are included [in other production activities except for the coffee harvest] ...

Although here the women can also clean with a machete, hoe, pick, with whatever. It is not that she is a woman and she cannot do it. If she does not have a partner, there are women who are alone, they have to do what a man does [Cooperative Leader, MP2, Woman].

Sometimes households will hire labor – both men and women – to harvest the coffee during harvest season. In general, younger people, often younger men, are preferred to be hired as laborers as they are perceived to be more agile and able to carry the coffee as “they don’t get as tired...they have more strength in walking and running, carrying...” [Cooperative Members, Men, MP2].

### ***Post-harvest processing***

Producers typically sell parchment coffee to the cooperatives, meaning producers engage in partial processing prior to selling their beans, and “the producers are the ones in charge of doing all that dry milling work” [Cooperative Leader, MP1, Woman]. Several women explain that while their husbands help with the coffee processing (i.e., the washing), it is primarily women’s responsibility to manage all post-harvest processing activities. A woman explains that women harvest the coffee, and “take care of washing, drying, storing” [Wives, MP1]. Both men and women shared perceptions that men are preferred for hiring as laborers for coffee production due to their perceived experience and that men request the work more than women. For example, one man shared, that men “have more experience than women,

and...they have more strength and agility to grow coffee” [Cooperative Member, Men, MP2] whereas a woman explained “men are the ones who come to ask about work, they come to ask if there is work cutting coffee, they are more men” [Cooperative Member, Woman, MP1]. Several men also noted that women laborers are better suited to conduct processing activities, such as pulping the coffee with a machine, fermenting the coffee in a tank, and then washing the coffee by hand [Cooperative Members, Men, MP2].

Once the coffee is harvested, it is washed and pulped by hand, unless a household has access to a pulping machine. The coffee is then typically dried in a household’s courtyard and once dried, women are responsible for collecting the coffee into a dried sack to transport for sale; “if the man has to help, he does it, otherwise women” do this activity [Cooperative Members, Men, MP2]. Men and women will store the coffee in sacks inside the house to avoid the coffee being ruined by rain.

### ***Sales and marketing***

Men participate in sales and marketing by moving the sacks of coffee and transporting the coffee to the point of sale, whether to the cooperative or another buyer. Men manage all negotiations involved in selling the coffee. A woman cooperative leader explained that only men manage coffee sales because lifting the coffee parcels is perceived as too difficult of a job for women,

Only men [manage the sales] because the load is heavy. Imagine, it is 59-60 kilos, it is with our own vehicle. Sometimes, if we see that it is a lot, we hire a private truck. [Cooperative Leader, MP2, Woman].

A woman explained that sometimes, if her husband is not home, she can oversee the sale of the coffee if the driver comes to their house, “Well...if my husband is not there, if he gave me permission to go sell it, then the driver will come to the house” [Cooperative Member, Women, MP1]. However, she would not load the coffee parcels onto the truck, relying on the driver, most likely a man, to do so. While women described overseeing a sale in the absence of her husband, they explained that their husbands still manage all decisions relating to the sale, including negotiating the price.

Men decide where and for how much to sell their coffee during the harvest season, often choosing between the cooperative or coyotes (i.e., independent, intermediary buyers). According to men, factors such as price and transportation options heavily weight the decision for where to sell. For example, members and their wives from MP2 explained that they only sell their coffee to the respective cooperative and sell approximately two bags (estimated around 80 kilograms each) each month from December to February. They sell to their cooperative as they grow organic coffee and their cooperative pays a premium for it, as explained by one man, “only to the [cooperative], since we grow organic coffee. [The cooperative] gives us a slightly better price, all the others are at a lower price. It is not convenient for us to sell to others because they have lower prices” [Cooperative Member, Men, MP2]. Wives from MP1 noted that they sell to both the cooperative and local traders with a preference for whichever pays more. Their husbands negotiate with different buyers to learn the best prices, and then determines where to sell their harvest and how much to sell to each buyer. Men members confirmed this, saying that sometimes, the coyote pays more so they will sell their harvest there. Members did not mention any negative consequences to not selling to their respective cooperative.

Additionally, transportation, or the lack thereof, is a key challenge for producers to sell coffee, as described by coffee producers and traders interviewed for this study. Coffee traders often either owned or hired a truck to transport beans from farmgate to market, which offered an advantage for producers to sell to buyers that offered this service. Producers living in more rural areas or further away from paved roads, and those without access to a means to transport their beans rely on selling to whichever buyer offers transportation services, whether the coyotes or the cooperatives.

## **Concepts of empowerment**

### ***Perceptions of empowerment***

Most of the cooperative leaders, members, wives of members, and market actors interviewed as part of this study were not familiar with the concept of empowerment, despite interviewers offering multiple versions of the translated phrase, and were uncomfortable trying to discuss elements of empowerment, or

empowered men or women. Many respondents were unaware of the term empowerment, however, a few described what they believed to be empowerment.

One woman understood empowerment as a woman who can make decisions for herself, “A woman who makes decisions by herself is powerful, so she has the power to make her own decisions effectively” [Cooperative Members, Woman, MP1]. However, one man understood empowerment and the ability to make a decision over one’s life as aligned with the concept of *power over*<sup>9</sup>, describing, “It’s if a man scares people, that’s what they call empowerment. If he wants to command alone, he does what he wants alone, he doesn’t respect people’s opinions. I call that empowerment” [Cooperative Member, Men, MP2]. He further explained such people are no longer really present in their community but described his brother-in-law as such a person, “I know a brother-in-law who was like that... empowerment... he sends you to do things you don’t like, but you have to do it because if you don’t, he slaps you or kicks you, but he is gone [now]” [Cooperative Member, Men, MP2].

Those unfamiliar with the term empowerment were, however, able to reflect on the changes of perceptions of women in general, and women’s relation to men and status within the community compared to what it had been during their childhood. A coffee trader from MP2 explained in response to a question if community perceptions of women had changed in the past few years, “Definitely. I remember from my childhood women were discriminated against a lot. Because women were not taken into account, only what the man thought, the man was given the rights...” [Coffee Trader, MP2, Man]. A woman from MP1 explained that now, women received more support to participate in activities outside of the home, “Well, I say ‘yes,’ because, for example, household activities now correspond to both [men and women], because women no longer have time to occupy themselves one hundred percent at home” [Cooperative Members, Women, MP1].

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<sup>9</sup> The literature describes four types of power: power within, power to, power with, and power over. Power over is defined as one’s control over people, resources, or others’ lives (Rowlands 1997), but it not often considered when discussing types of power that contribute to empowerment.

A Root Capital staff member shared an example of a local woman who became employed as a coffee taster and had to travel to and from work using a motorcycle. While she initially received negative pushback from her community, and to an extent still does, the staff member described her as a role model for other women and younger women,

For example, there is a young woman who is a taster in one of the organizations, and she is an example of a woman who has left the community, has taken on a role that, for example, in order to go to do her work as a taster, she has to leave her community on a motorcycle, and that is not a female action in the communities. It was difficult for her because they saw her badly. But that is a process that she started with the encouragement of her family, her father. Of course, it has changed her relationship with the community and as the new generations see her, other young women have been encouraged to ride a motorcycle [Root Capital Staff Member, Woman].

### ***Dimensions of empowerment***

#### ***Access to resources and credit***

Respondents described the extent to which they can or cannot access key resources that are valuable to their role in the coffee value chain. Producers and agri-entrepreneurs interviewed for this study explained that they either used personal savings or money borrowed from family members to start their business or expand their coffee production. One woman explained she sold assets to improve her coffee production, “I sell my chickens, hoping that more coffee will be harvested” [Cooperative Members, Woman, MP1]. Another woman explained that to expand her coffee production, she “only invests when she is paid, so [she] invests in the coffee when the money comes [from the harvest]” [Wife, MP2], indicating that she only invests her own income or savings to expand her activities. Several women explained that they do not seek out loans or credit options to invest in coffee activities. A few wives from MP1 also explained that they do not know of any places to take credit. A cooperative leader explained that the lack of credit is the main problem facing them as an organization and their members, “that is our main problem right now, there is no credit. I sit with my hands tied, I can't do anything” [Cooperative Leader, MP2, Woman].

Most of the respondents from MP2 explained that there are effectively no formal sources of credit available in the municipality to coffee producers. While Root Capital offers credit options to the cooperative, they do not offer credit options to the cooperative members. In MP2, coffee producers rarely seek credit and when they do, they rely on informal sources such as neighbors or family members. Often terms include an interest rate of 10 percent, but this varies depending on the lender and the specific terms agreed. A man from MP2 explained,

Here you can lend to another person. Right now, if you ask the bank for a loan, I don't know how much interest it charges you. But here if your neighbor asks you for something...if she asks you for 100 pesos<sup>10</sup>, she charges you 10 pesos<sup>11</sup> in interest per month [Cooperative Members, Man, MP2].

In a group interview, several men explained there is a bank, but it's difficult to meet the terms, such as having a land deed or a utility payment with their address to demonstrate as proof of ownership or payment to secure a loan.

An option for financing in MP1 was BioCafe, a microbank that offers small credit options and includes coffee producers among their clients. They offer loans and review potential borrowers' credit history and seek references from neighbors as part of their due diligence strategy. For coffee producers, a credit provider explains that they give credit to cover a producer until the harvest season, "I give a person the credit so that they can boost their coffee harvest... And when the harvest is over, we obviously wait [to be paid]," which is when credit terms end and the credit must be repaid [Credit Provider, MP1, Man]. In his experience, none of the coffee producers who had taken credit had failed to pay back the debt. However, despite this option available to producers in MP1, one producer explained that she preferred to not take credit because of the unfavorable terms, "Because if we ask for a loan, the interest is very high and I haven't even finished paying my bills and I don't even have money" [Cooperative Members, Women, MP1].

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<sup>10</sup> Approximately US\$5.75 as of August 2023.

<sup>11</sup> Approximately US\$0.58 as of August 2023.

The lack of options to access credit is a key limitation for both men and women, who describe being further limited in access to important equipment or hired help that would otherwise free their time to spend on different activities or to help expand their investments into their coffee or other income generating activities. For example, men coffee farmers described that they often hire labor to assist in coffee production activities but often do not have additional funds to hire laborers and instead rely on family members, “Yes, because sometimes we don't have money to pay people, we work as a family, among ourselves” [Cooperative Members, Men, MP1]. For some men that cannot hire additional help, they help their wives in preparing meals to assist in easing burdens,

She finishes cooking and I can put the food on the plate, invite the children to eat, while she is preparing. That's how I help her. And we don't find another person to come to help, but since we don't have enough money, that's why I feel easier that way” [Cooperative Members, Man, MP2]. Cooperative members also reflected on the benefits offered by new machinery that would both save time and effort in post-harvest processing activities. For example, men expressed wanting to purchase a pulper machine that would ease the burden of pulping the coffee by hand, which is usually women’s responsibility. Some of those interviewed for this study had purchased such a machine, but others could not afford one (approximately \$2500 pesos<sup>12</sup>). When asked what kind of support they would need the most, a man from MP2 shared, “Specifically, for me, that they support us with a pulper with a motor so that one does not get tired of pulping the coffee because it is also hard to pulp it by hand. But if we have a motor with a pulper, it will make it easier for us” [Cooperative Member, Men, MP2]. A woman from MP2 who does the pulping indicated a machine would both make the work easier for her and would be more effective for processing the coffee.

### ***Time use***

Men and women describe how they typically spend their time in a given day, although these activities vary by season. Men will wake up, drink coffee, and head to the farm, whereas women wake up earlier to

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<sup>12</sup> Approximately \$136.56 USD in October 2023.

begin preparing food for the day. One woman describes, “Well, we get up earlier to make tortillas. We take the food. We eat there in the coffee plantation, and so when we return in the afternoon and we start cooking again, I will prepare the food and so on” [Wives, MP1]. Some women noted that their husbands will sometimes help to wash dishes after meals. Another woman explained, “We get up at 4 am, and it gives us time to [prepare for the day]... We travel about a half an hour walking [to go to the coffee farm]” [Wives, MP2]. Another woman shared a general observation when describing how men and women spend their days, “No, women never have rest, men do... Because men don't bake, they don't wash dishes, they don't cook, they just go to work and come to eat, to bathe if they want to, but women have more work than men” [Cooperative Members, Women, MP1].

Sometimes men will pay laborers to help with the coffee cultivation tasks, which frees up both men's and women's time to spend on other activities. With respect to coffee production, men will pay others to harvest the coffee to free up their time, as they describe not having enough time to accomplish all their activities, “Sometimes not, that's why we have to pay laborers to harvest the coffee. When it starts to ripen, it doesn't wait, just as it rains often here. If it rains often, it ripens quickly and falls [and then is ruined] if you don't gather laborers to cut it and put it together” [Cooperative Members, Man, MP2]. Another man explained he pays laborers approximately 150 pesos<sup>13</sup> per day to help him on the coffee farm. In the event a woman cannot accomplish all the productive and or care tasks she planned to in a day, she typically will leave those tasks for the next day to complete.

### ***Access to coffee information***

A coffee trader explained, “If someone does not know how to access information on the current price [of coffee], the buyer [beyond cooperatives] will give you a lower price” [Coffee Trader, MP2, Man], highlighting the importance of having the know-how and confidence to ask for prices to begin a negotiation. Additionally, as an intermediary buyer, he will often negotiate with his buyers (i.e., larger coffee buying companies) but he does not negotiate with the producers from whom he purchases coffee.

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<sup>13</sup> Approximately \$8.19 USD in October 2023.

Several wives of primary cooperative members interviewed in this study explained that they learn of the coffee price from their buyers. Several of the women members were unaware of the price for coffee and indicated that they just take the price from the cooperative delegates. When asked “how do you know the price?” two women in the same group said: “According to the cooperative delegate, he says the price” and “[the delegates] know how much it will cost” [Cooperative Members, Women, MP2]. Men members also explained they do not know how to access daily information on coffee prices, so they rely primarily on the cooperative managers to tell the price for the day. Without access to validating, secondary information of daily coffee prices, women (and men) may receive lower prices for their coffee as they are typically relying their buyer to inform them of the price.

### ***Decision making***

Men and women interviewed as part of this study explained that intrahousehold decision-making dynamics vary by household and individual couple. However, in general, men and women engage in joint decision-making to an extent, but that men always have the final say. Several women interviewed described that while women sometimes can make decisions, they are never “alone” and that their husbands always “join them” to make decisions [Wives, MP1]. After an interviewer asked several times which types of decisions women can make alone, a woman as part of a group interview explained that they actually “ask” their husbands for things, which they described as their role in joint decision-making. For example, a woman explained, “well the decision is made by my husband...we [women] only make a decision as women who ask for clothes or order food for my husband” [Wives, MP2]. Men typically give their wives an allowance with which to make daily decisions over small household needs, such as food purchases or children’s clothing. Women have latitude over these decisions without having to inform their husbands as long as they do not deviate from normative expectations over how to spend that money. For example, women from MP1 explained they make decisions over, “well, just the tortillas and work at home.” [Wives, MP1]. Women decide what needs to be purchased, but men give approval, “My wife, because when she has nothing in the kitchen, she will tell me that this is missing, we are going to buy this.... [and then I] say yes, that it's fine, to go shopping” [Cooperative Members, Men, MP2].

Both men and women indicated that men made the decisions around coffee production and coffee related activities. There were variations in how households managed income from coffee. In MP2, men and women explained that coffee income was managed by men within the household and would be used to cover the majority of household expenses, such as items for the house, remodeling, or to reinvest into the coffee production. Wives of members from MP2 explained that their husbands have the final decision for how money is spent. For example, “if the woman says that she does not have a skirt, the man decides, [he] decides it is five skirts” to purchase [Wives, MP2]. Men from MP2 explained that they use money from coffee sales to purchase items for the household, but generally give it to their wives to save for necessary household expenses, as referenced by one man,

Because first I'm going to respect my wife, my children, because I can put up with another job elsewhere. It's easier that way. If I still have money left over from when I sell my coffee, I save it. My wife saves it. What if my child asks for something? Or my child gets sick? So they can take them to the pharmacy, buy their medicine, that's how I spend my money” [Cooperative Members, Men, MP2].

However, wives of members from MP1 explained that their husbands sometimes give them money, which they have to either save or can use to buy small items, such as clothes for the children, “We also decide money to buy what the children want, if they want their sandals” [Wives, MP1]. A woman from MP1 expressed that her and her husband both must agree on how the household incomes are spent, as they both contribute to the income, “The two of us [decide], since it's a family. We both work, I can get the money whenever I want” [Cooperative Members, Women, MP1].

### ***Attitudes around intimate partner violence***

Women and men shared varying views and perceptions regarding attitudes around forms of gender-based violence (GBV), specifically intimate partner violence and acceptable treatment of men and women.

Participants shared their perceptions around GBV in the context of different forms of “mistreatment” of men and women.

Many participants noted that there is no mistreatment of women or men—referring to gender-based violence—in their community, however a few did reference instances when potential mistreatment may occur. Many women referenced that their knowledge of potential mistreatment amounted to gossip and therefore they could not describe much regarding the extent to which it happens or is acceptable. In response to a question asking if men mistreat women in their community, a wife of a member from MP2 explained, “If you believe what the husband says, everything is fine” [Wife, MP2], whereas another said in response that men typically drink beer, and that they “do not like him when he’s drunk” [Wife, MP2]. One woman explained that she hears of women being mistreated and suggested it occurs because women do not value themselves, “Because they allow it, I say then... I don't [allow it]. Because they don't feel powerful, they feel that a man has more value than a woman. But for my part it's not like that, a woman also has value, a woman can defend herself just the same” [Cooperative Member, Woman, MP1]. One woman explained that if she had the option, she would prefer to be single, “because nobody takes our time... no one wastes my time and no one scolds me” [Cooperative Member, Woman, MP2].

A few men shared a different perspective on the topic of mistreatment. Men coffee producers described perceived changes in acceptable treatment standards towards women and men,

Who knows, from my point of view, they say that [in] previous years women were mistreated.

But now there is international information on women. Women already have rights, men cannot hit them, because if they hit them and they complain, they put him in jail. That's what scares us, that's why women are respected [Cooperative Member, Man, MP2].

Another man further explained that it is acceptable for women to hit men, “A woman can slap you if you bother her in her way. But you don't slap her, but she slaps you” [Cooperative Member, Man, MP2]. Men from MP1 also suggested that there are instances where women mistreat men, but do not elaborate on what this means. A woman explained a different perspective, that there is more abuse of women because of increased use of substances among younger people, “I think there is more abuse now, now that young people have very complicated lives of drugs and alcohol” [Cooperative Member, Woman, MP1].

## **Collective agency of farmer producer organizations**

### ***Collective membership gender dynamics, rules, and service access for couples and families.***

#### ***Membership and requirements***

FPO leaders and members from MP2 and MP1 explained requirements for maintaining a membership at the respective cooperative. In MP1, such requirements included at least one hectare of coffee, and “that they have their property papers, because sometimes it is the same coffee plantation, and two to three people register with that one. And I think it is about \$500 pesos<sup>14</sup> for a member contribution, and that [they have] their credentials, CURP records<sup>15</sup>” [Cooperative Leader, MP1, Woman].

In MP2, the membership requirements were similar. A leader explained that to qualify for membership each household member must account for at least one hectare of coffee. For example, if a household has multiple hectares of coffee, then multiple household members could register for the FPO, “You can if you give your parcel, but it can’t be a small parcel, but generally those who have several parcels sometimes divide, it depends on the decisions they make at home, it will no longer depend on us” [Cooperative Leader, MP2, Woman]. Additionally, the cooperative in MP2 only accepts organic coffee, and therefore to become a member, producers had to cease using chemicals on their plots for at least three years, “[the cooperative] investigates you first if you are not using them right now, [and asks] how long it has been since you stopped using chemicals” [Cooperative Member, Men, MP2].

#### ***Decision making***

Root Capital staff explained that, in general, most cooperatives with which they work have three tiers of decision-making bodies: the General Assembly, the Council of Delegates, and the Board of Directors and Supervisory Board. The General Assembly is typically the highest authority and cooperatives convene this assembly once a year and make decisions on how to close the harvest season and what to prioritize for beginning the next coffee season. The Council of Delegates is convened to include member representatives and is intended to reflect the voice of the members in more frequent decision-making. And

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<sup>14</sup> Approximately US\$28.75 as of August 2023.

<sup>15</sup> The *Clave Única de Registro de Población* (CURP) is the national system for registering legal residency in Mexico.

the Board of Directors and Supervisory Board make outward facing decisions in tandem with the cooperative manager about production, marketing, and commercialization issues.

The Council of Delegates is the space for representatives from each community included in the cooperative to come together to make decisions about new projects, new ways of working, and “they also make decisions, which have to do with business operations, from harvest estimates, [offering] internal credit, how much is the minimum, how much is the maximum, what are the policies or guidelines that a producer must comply with to access this credit, so these are some examples” [Root Capital Staff Member, Man]. A cooperative leader further explained, “After there is a meeting with the managers, they call an assembly meeting, only the delegates of each community come and the delegates communicate to the partners” [Cooperative Leader, MP1, Woman]. In the MP1 cooperative, the only opportunity for members to have their voice represented in decision-making was through their elected delegate, whereas in the MP2 cooperative, members would participate more directly in meetings (described below in the ‘Participation’ section). In both cooperatives, most of the delegates who participate in decision-making are men, which aligns with patterns of intrahousehold decision-making around coffee; approximately ten percent are women for the cooperative in MP1 and only two delegates are women for the cooperative in MP2. The delegates vote on decisions put forth. Members can change the delegate that represents them by filling out “change of delegate” paperwork. A leader from MP2 explained that while both men and women participate in the decision-making processes, more men put forth their ideas, suggestions, and plans when discussing.

### ***Women in leadership***

When discussing perceptions of women leaders and experiences of women in leadership, many participants did not offer much insight. Those that did shared rather high-level perceptions of women leaders, suggesting that these topics or dynamics may not have been thoroughly interrogated or reflected on by those who participated in this study. Indeed, these represent first layer responses that do not point to underlying issues.

Several cooperative members and leaders interviewed for this study indicated that while women often do not assume leadership positions in their cooperative, there would presumably be no barriers for one to do so. These participants did not offer reasons as to why there were no or fewer women leaders than men, suggesting that these participants have not considered the different barriers women may face compared to men to access, assume, or retain leadership positions. However, a few participants did offer reflections as to why women did not engage in leadership positions, with most of these indicating superficial perceptions that women are perceived as not liking to participate or being too shy to participate. A woman leader in MP2 explained that most women are “too shy” to participate, even though they have the “right” to participate and the knowledge of the work involved in coffee production and processing to share ideas,

Here is a custom that membership roles can be occupied by the women, and leadership and decision-making roles by the men. When I was not president, I used to sit wherever I wanted.

And the women don't; they themselves move away. And why? Why do they move away? They feel shy [Cooperative Leader, MP2, Woman].

She explained that women may be too shy to speak up or actively participate in decision-making or leadership processes and look to her as a leader to share their ideas instead. She describes how a lack of confidence or intrinsic agency may be a barrier to women's full participation in leadership or decision-making positions,

I have told them, 'don't be afraid, speak up.' Because when I sat down, well, they look for me. [I say] 'you also have the right to speak', nobody is going to ask them to participate. We all have the right to participate. [They say to me,] 'no, you speak'. Then they pass me the message, what they want to say, and they want me to transmit. But I tell them, 'I invite you to say what you feel, what you think'. We all have brains, I tell you, so we all have the right to participate. No one can tell you that you can't participate. And you know who works, the woman gets up early. She must support her partner or the workers who support him. They know what work they do; they don't

want to. There are a few, one or two women, who sometimes participate, but nothing more. We can say, out of 20 women, only one more participates” [Cooperative leader, MP2, Woman].

Men members of her cooperative explained that she had been elected because she was “respectful,” had managed her coffee plot well, and had participated in the cooperative for many years, so she was well known around the cooperative. They spoke highly of her as a leader.

### ***Participation***

Cooperative leaders and members describe how men and women participate in the respective cooperatives, and overall share observable differences in how they participate in each. In MP2, there are more opportunities for producers to engage and participate in meetings, technical assistance activities, and other activities, whereas in MP1, producers sell their coffee to the cooperative, but otherwise are engaged through delegates that represent them at the Council of Delegates. The cooperative in MP2 has a smaller total membership than that of the one in MP1, which may account for the differences in how these structures are established. Both men and women are members of each cooperative.

In MP2, members participate in meetings, social activities such as coffee parties, and in capacity building activities. A woman explained general topics discussed at a meeting, “They talk about the price, and they talk about how things work there in the warehouse, if they need sacks, and they deal with the partners” [Cooperative Member, Women, MP2]. Several men described a typical meeting at the cooperative,

Well, they let you know the day and date of the meeting, and the time. Upon entering, almost all of us are religious, we begin with a prayer, asking God for things. And after the points of the meeting begin, there are general matters. If you do not agree on something, you have to complain to the manager. And if we all agree on the topics, we finish the general meeting. And from then on, around noon, the manager invites us to have some soft drinks and bread” [Cooperative Members, Man, MP2].

Outside of attending the meeting, women members are responsible for cleaning activities, as described by one man,

Yes, the women cook, wash the dishes, start sweeping. And before the party or any meeting starts, and if the meeting ends, she takes out her broom and starts sweeping. The men finish [the meeting] too, but the men don't [help]. Just women, picking up, clearing up the chairs, the table, when the women are sweeping, like that" [Cooperative Members, Man, MP2].

However, men are responsible for other activities, which in turn, men perceive as an unequal balance of expected tasks in women's favor, and thus prefer men only cooperatives. Several men explained that they would prefer a cooperative that was only men, because women members are perceived to be unable to complete certain collective tasks, which puts more work on the men members to accomplish these activities. For example, women are unable to load packages or clean the warehouses, because "they don't have more practice than men, they don't have more strength, and because if they grab machetes, what if they cut their feet?" [Cooperative Members, Man, MP2]. Women are thus perceived to "have more rights" as they cannot do these tasks. Women are required to work in the kitchen, but men shared that they also help in the kitchen and thus it does not balance out the work, according to their perspective. Other men and women interviewed in this study had shared either no opinion or that mixed gender FPOs were working well.

Some wives of members had indicated that language barriers could be a potential challenge for men or women to fully participate in the cooperative's activities. Cooperative activities are conducted in Spanish and several of the interviewees cannot understand Spanish as well as their preferred language. While describing how her husband participates in a meeting at the cooperative, one woman explained, "We only hear more or less what they say, but sometimes not everything is understood [because] it is in Spanish" [Wife, MP2], suggesting an important barrier to reaching those who may need additional translation support if all activities occur in Spanish.

In MP1, most members described that they effectively only participate in the cooperative by selling their coffee sometimes to them, but otherwise do not engage in meetings, social activities, or receive technical support. They do not participate in meetings as only delegates go to meetings on behalf of the members. Their wives interviewed also confirmed, "They don't notify us of the meetings...the

delegates are the ones who only make it to the meeting” [Wives, MP1]. One woman member shared that the delegates participate on their behalf and that she does not participate in meetings herself,

Not much, because only the delegates go and the delegates come to inform us [of the meeting] in our community... They arrive at the warehouse and give them talks, and notify them, it is more than anything information so that, for example, when the CERTIMEX<sup>16</sup> certifications will arrive” [Cooperative Member, Woman, MP1].

However, several members explained a disconnect between the members and their delegates, as their delegates often do not relay the information back to the members. A man explained,

You already know that it is pure business, I see it. Sometimes the delegates go to meetings. I am thinking what they are going to say, what talk did they hear there. I thought they were going to [tell us] the information. But no, I just see it. The delegates come, just like that, they don't even talk to you. I ask them, that if technicians will come on such a date and at such a time. But it's not like that” [Cooperative Members, MP1, Men].

Their wives had indicated that their husbands joined the cooperative because cooperative technical specialists had recruited them as producers and promised support, but no such support had materialized... “they told us that they were going to give us support and then there is no support anymore” [Wives, MP1]. Instead, most members view this cooperative only as a potential buyer when the price is competitive, and they do not receive additional support from them.

However, one woman member did share that she received additional technical supports from the cooperative and described this as a key motivation to joining and staying with the cooperative,

Sometimes they give courses, workshops, they come to the communities to give talks. And then they inspect us and give us talks about organic coffee, that if we put in fertilizers like this, it still harms our health. And that's why we wanted to participate with organic [Cooperative Member, Woman, MP1].

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<sup>16</sup> [CERTIMEX](#) is a private organic certification company in Mexico.

### ***Benefits of cooperative membership***

Members and their wives described the key benefits households with membership experience from participating with the respective cooperatives. Participants from both areas explained that consistent or reliable prices and transportation support were key benefits, whereas participants from MP2 added that they received technical assistance from the cooperative to support their production.

Cooperatives offer transportation to reduce a key barrier faced by rural producers who often lack the means or time to transport their harvest to the cooperative for sale. Typically, cooperatives hire a truck to pick up the harvest from its producers during the harvest season. A coffee trader in MP2 had explained why being part of a cooperative enables him to sell coffee, particularly as he lives and grows coffee in a more remote area without close access to paved roads. He explains,

[Coffee is] easy to sell, because as [part of] an organization, the organization announces by cellphone what day are we going to sell the coffee. Or we also check the price or if there someone who can let us know how the price is going. If it is recovering or going down, then they let us know if the price suits us, we get notified on that day we are going to sell [Coffee Trader, MP2, Man].

The organization then sends a car to transport the coffee for sale. Cooperative leaders and members interviewed for this study also elaborated on transportation as a key challenge for their coffee production. Cooperatives must offer transportation as a key value add compared to other services. One leader from MP1 shared a recent experience that underlines how important transportation services are for coffee producers to bring their harvest to market. The cooperative did not provide transportation services to all its members. According to this leader, although a delegate had recently successfully applied for credit from the cooperative and used this credit to facilitate the transport of coffee from his community to the cooperative for sale, this approach was not sustainable in the long term as the delegate could not maintain the costs of this transportation. Thus, the delegate and the 60 producers he represented all resigned from the cooperative as the transportation issue could not be resolved, “because sometimes it is

difficult because the community is far away and we, [the cooperative] can no longer go there to bring the coffee here” [Cooperative Leader, MP1, Woman].

Second, the cooperative leaders and members also described that the cooperatives offer more consistent and competitive pricing for coffee than other buyers in the community, particularly coyotes who offer much lower prices. A cooperative leader described this as a key benefit to selling coffee to a cooperative,

We don't go down like the traditional buyers called coyotes. They go up a lot, and the next week or two weeks the price of coffee is already low again. And here it is stable, it remains the price that is set, and until the end of the harvest [Cooperative Leader, MP2, Woman].

Women cooperative members also shared that they prefer to sell to the cooperative as “the price does not go down, it always stays the same, it even goes up” whereas with “private individuals, the price does not hold firm, sometimes it goes down and sometimes it goes up” [Cooperative Members, Women, MP2].

The cooperative also buys coffee from each of its producers regardless of the quantity. There is no minimum production, “Even if they have one or two packages, they are received, because it would be discriminating against them for having little, and not buying their coffee” [Cooperative Leader, MP2, Woman].

Finally, members from the MP2 cooperative explained that technical extension agents come two to three times a year to support them. One man explained,

The cooperative also teaches us how to work, how to grow coffee, how to take care of it and how to raise the plot .... No producers, only the technicians, and then the technicians come here in each community, they gather us all together and take us to the plots to teach us how to clean, how to shade, how to cut the coffee when it's ripe. They teach us everything, even to pulp it, and how it ferments; how often to take the temperature when washing it when it is fermenting. They teach us everything, that's why we are there” [Cooperative Member, MP2, Men].

## **Discussion of Root Capital's advisory and technical services**

### ***Observations of Root Capital's support to FPOs and its members***

#### ***Descriptions of engagement***

Root Capital provides advisory, lending, and technical services directly to the cooperatives at the cooperative level (instead of at the farmer level), thus only the cooperative leadership interviewed for this study were mostly able to speak directly to their engagement with Root Capital and forms of support received. While most cooperative members interviewed for this study were unaware of Root Capital's exact engagement with the cooperative, they were able to share some reflections of specific support received.

A Root Capital staff member from Chiapas articulated their objectives in working with coffee cooperatives in Chiapas,

Root Capital works for the well-being of the agricultural communities in the regions where we are. Although it is said to be for a global impact and for the resilience of these communities, where the small producers with whom we are working directly, is to benefit these communities where they are immersed, the client organizations that we are serving. Above all, since 2021, we have been talking about economic resilience, climate resilience, organizational resilience and that it benefits women and men, and above all, there is a construction of equity and inclusion...equality between men and women and the inclusion of young people [Root Capital Staff Member, Woman].

Further, another staff member explained that following an initial diagnostic with each new client cooperative, they work with its leadership to set realistic goals to increase its likelihood of being able to reach their set goals. Referencing their work to strengthen women's economic empowerment, a staff member summarized,

Because the goals that we propose come from a diagnosis that we make jointly with [the cooperatives], and the vision of the goals is closely linked to the reality of each organization... There are organizations that have already been reflecting what has worked... So, the goals they

set can be more ambitious. [However,] there are other organizations that are just beginning this process and have smaller goals, but we are always looking for them to be closely linked to their reality... I think because of this situation, because we are careful to encourage them to set realistic goals [Root Capital Staff Member, Woman].

Cooperative leaders also discussed the joint approach to designing and tailoring services with Root Capital but noted that only the cooperative employees participate in this engagement. By targeting the organization level, Root Capital's theory of change is that their support can be amplified to reach more producers than in if they had worked with producers directly and should strengthen the enabling environmental and sustainability of their work,

We work through organizations, not directly with individual producers, which makes the impact more accurate... let's say that even if we try to reach a greater number of producers...the idea is that there would be a strong impact, and it is not the way we work. It seems to me the way to ensure that [working at the cooperative level] is more sustainable than working with individual producers [Root Capital Staff Member, Woman].

### ***Descriptions of benefits according to cooperative leaders and members***

While both cooperatives included in this study opted to begin receiving the formal Gender Equity

Advisory services in 2023, none of the interviewed respondents in this study noted these services as yielding observable benefits or influence. However, cooperative leaders did reflect on other benefits they observed because of their engagement with Root Capital, namely around improved agronomic practices, improved business practices, and access to credit leaders A cooperative leader explained that because of Root Capital's technical services, the cooperative had helped emphasize to their members the need to replant coffee plants for plots with plants around five to six years old. Root Capital staff observed that cooperatives were providing their members with improved agronomic advice and support for how to keep coffee plots in better conditions and members were implementing these better practices as a result.

Additionally, Root Capital staff and cooperative leaders shared improvements at the organization level because of Root Capital's Business Advisory services. One cooperative leader noted that the

digitization of their operations was a clear benefit that they learned from Root Capital advisory services.

A staff member shared an example of a cooperative that had improved its accounting processes,

In this case, [a cooperative], where we began to work on accounting, they did not have an organized accounting. We have been implementing [our services] for around three years and today they can already generate financial statements or financial documents or reports from their accounting software [Root Capital Staff Member, Man].

Leaders also observed that Root Capital supported them in improving roles and business operations, as described by one cooperative leader when asked how Root Capital helped them, “Above all, marketing, our rights and obligations, to carry out the activities, [to understand] which job is mine, which one is up to the secretary, which is up to the treasurer, the technicians, the manager, and how we should carry out our activities to improve our function as a directive” [Cooperative Leader, MP2, Woman].

Finally, cooperative leaders described that Root Capital’s provision of credit was a key benefit that served to support the cooperative and its members, particularly in MP2 where there were limited to no alternative options. A Root Capital staff explained their approach to providing credit,

We are the company that gives the lowest interest rate in the coffee industry, compared to the national bank, or local bank, any financial intermediary or bank among these. We give very flexible rates. We do not ask for a mortgage guarantee, and we do not ask for a liquidity guarantee, which is part of the requirements of the local bank. And we do not ask for it, because we know that the cooperatives do not have it. They do not have a mortgage guarantee for a loan, and they do not have liquidity. That is why they are asking for financing [Root Capital Staff Member, Man].

A cooperative leader explained that the credit they received from Root Capital was important to be able to pay their cooperative members without delay when selling their harvest,

So that we can pay [the farmers] when they come to deliver their coffee. Because sometimes there is no money to pay and we take 1 or 2 weeks to 3 months to pay the producers, and with the

credit that Root Capital grants us, [the producers] benefit in that [we can] give them their coffee payment quickly [Cooperative Leader, MP1, Woman].

A few cooperative members interviewed did note that a benefit to selling to the cooperative was that they are paid immediately for their harvest, which they appreciated. Leaders also explained that the process to take a loan from Root Capital was very easy.

While cooperative leaders interviewed as part of this study were generally positively receptive of their engagement with Root Capital, they noted that their farmers and members are unlikely to understand or see the benefits of this engagement. One cooperative leader explained, “The workshops have benefited us a lot, but it is only a small group. I would like for all the farmers [to participate], but it is just a part, only the directive, the technicians” [Cooperative Leader, MP2, Woman]. Another leader shared in response to a question asking other types of support needed, “Exactly, but that it directly benefits the producers. I'm not asking you to give me 5 to 6 million pesos for the warehouse. Well, it will be useful for many things, but the producers don't see it directly. Instead [providing support directly to them], so they can see it and feel motivated, if such an organization is supporting us” [Cooperative Leader, MP2, Man].

Indeed, members interviewed as part of this study were generally unaware of Root Capital's engagement with the cooperative. Some men members were vaguely familiar with the name Root Capital but were unaware of the specific services provided. Some women members understood Root Capital to be a coffee buyer. They also thought they were a bank and indicated wanting to request credit directly from Root Capital; they also wanted Root Capital to provide bags for the coffee nursery. A few men members were aware that Root Capital had worked directly with the cooperative's board of directors but were unsure of the extent of that engagement. A few men were aware that Root Capital had given their FPO a loan to fund a truck for transporting the coffee harvest. These farmers explained that this truck saved the farmers potential lost harvest and time by picking up the coffee bags directly at their home instead of requiring the farmers to transport their harvest to the cooperative, typically a huge time and money cost for producers, “To take the coffee so that I don't pay for another truck...because if I take my coffee out

onto the road it's free, they don't charge me, that's why it helps me a lot" [Cooperative Members, MP2, Men].

### ***Staff perceptions of barriers to engage with clients***

Root Capital staff interviewed as part of this study shared different factors that may limit their ability to fully reach and/or effectively work with clients. Certain external barriers, such as security concerns, weather challenges, and cooperative staff turnover, were observed to limit the ways in which Root Capital could fully engage with different types of clients or starting new portfolios. Specifically, men staff members reflected on these types of challenges, whereas women staff members reflected on challenges they faced specifically as women working in client-facing roles. One woman reflected on her previous experience as an advisor, noting that her advice or technical expertise was often questioned by clients,

When it was my turn to become an adviser, well, there were only male advisers. Then [the clients] asked me the direct question, 'were you going to be able to teach us this subject? If you know?' And I ask them, 'why do you hesitate?' [and they would say], 'It's just that so-and-so knew a lot,' and [I would respond], 'why do you think I don't know? Why do you doubt it?' So, they didn't dare to say it, but they did [effectively] tell me. And for example, when I introduced other colleagues, they didn't ask them that, and they were men. So, it did have to do with my status as a woman [Root Capital Staff Member, Woman].

While staff observed that this particular dynamic with clients tended to be improving, there remains challenges that face women staff, in particular, such as comments or actions that amount to sexual harassment, as explained by a different woman staff member when asked about challenges she faced in her work,

For example, the sexist jokes, the comments about, 'how pretty you are', 'you look good today', or, 'how beautiful! Introduce her to me'...comments like those that are to praise, respect, like, 'oh, I'm giving her a compliment!' It's that it's cultural and culture is good. So, no, there are things that still haven't been achieved. Also, if they touch us suddenly, well, alas! That wasn't

proper, was it? But that is still happening, but I think it has been less [Root Capital Staff Member, Woman].

However, men staff do not report observing these issues between themselves and clients, or between their women colleagues and clients.

### ***Observations of Root Capital's interventions to address women's economic empowerment***

As described above, Root Capital works at the cooperative level to provide interventions and services that aim to improve overall cooperative functioning that would also strengthen the cooperative's ability to work with and benefit its members. As of 2023, these advisory services have focused on addressing structural and normative barriers that limit women's full engagement and benefit from cooperative services and membership (i.e., Root Capital's formal Gender Equity Advisory Services). While there was limited discussion or perspectives on these services from the cooperative leadership or members interviewed for this study, the Root Capital staff shared observations and examples of potentially promising interventions that could advance these objectives. Root Capital's gender equity work focuses on raising awareness among cooperative leadership about the "gender methodology" and to implement or revise existing policies to be equitable. Root Capital advisors guide cooperative leaders in determining the right approach for their cooperative to implement changes and monitor outcomes from such changes, as described by one staff member,

[We focus on] detecting what barriers women have to participation and what can change the process. Some intend to make their gender policy, others intend to change, for example, the internal credit policy and test how these changes work. Since we accompany them in these processes, we do not leave them alone, as we are ensuring that some of the tasks that are proposed in their action plan are fulfilled. And then we measure at the end of the year that it was achieved...Part of our job is to accompany them and to monitor and measure, because something that happens a lot in organizations is that they do a lot of actions, but they don't monitor or measure. In this work, we are very focused on starting to do that more systematically, and that

they continue to monitor and measure because seeing that there is progress encourages them to continue with this process, so it is very important that they measure what they are achieving.

[Root Capital Staff Member, Woman].

While explaining why Root Capital addresses issues of gender equity at the cooperative level, a staff member summarized the double burden many women – both members and nonmembers – involved in the coffee value chain face and the value add of the opportunity to join a cooperative, and thus opportunity for Root Capital to support them,

So, the fact that [producers] organize themselves into cooperatives is a tremendous opportunity for small producers, but the fact that they do not see that women producers are in a much more complex situation and that they cannot access the small benefits that the cooperative provides, seems to me to be not only a very unfair issue. But also, it is a problem that they cannot see the depth of the consequences. Not favoring women in general, I think, delays the development of society, but particularly in rural areas, where life is much harder, women not only experience very strong barriers, but are also a driving force for their communities, which is not being appreciated, because they carry a much greater burden on their backs, and the decisions they make have an impact on collective community life that is not appreciated [Root Capital Staff Member, Woman].

Overall, both men and women staff described the need to address inequality at the cooperative level, as expressed through their own observations of gender dynamics at the cooperatives as well as via external pressures. One staff member noted there is also external pressure from certification organizations to implement or strengthen more equitable practices to meet these requirements, “And then a moment of opportunity, because the external pressure is, for example, Fair Trade, it asks them to have greater equity and it is putting a little pressure on them to change the rules of the game” [Root Capital Staff Member, Woman]. Other staff members discussed unequal gender dynamics at the cooperative level, which were also described by several cooperative leaders and members, as a motivation for addressing inequalities

through their advisory services. In the opinion of one staff member, there have been some observable changes in how cooperative members may perceive acceptable jobs for women,

On many occasions, many male directors still see their colleagues as, oh, well, since she is a woman, she can continue sweeping, she can take care of the coffee. So, there is still that perception, [but it] has been reduced [Root Capital Staff Member, Man].

However, other staff highlight the need for gender integration across all advisory areas as there exist unequal power dynamics within cooperative operations that limit women's efficiency in the workplace and their ability to participate in and fully benefit from their work. Several cooperative members explained that women often engage in gender normative tasks at the cooperative, as men are often required to cut the grass around the warehouse and women are expected to clean the kitchen. One man described the difference in supplementary requirements for women compared to men members, "To have that point that they did attend, perhaps it is cleaning the kitchen or the pots, but the work [for women] is not the same as the man" [Cooperative Members, Men, MP2]. A staff member explained,

For example, many women in middle management who are the ones our colleagues work with, have detected that they are doing tasks that do not correspond to their areas...and that takes time and reduces their efficiency in their work, but that they are tasks that women are supposed to do, such as running errands, cleaning the office. So, this lack of time is a difficulty that they have in working with us and that our colleagues have detected. Gender relations in work teams where there may be, for example, another thing that our colleagues have detected to request gender intervention is that many women are assigned work that is difficult, that is detailed, but they are not allowed to make decisions that have to do with their area, and that reduces their efficiency in their work. And it has to do with power relations, where the decision-maker is a man, even though he is not their boss, or being their boss, decisions that they should make. Also another thing that they have detected is that they do not have access to training because men are given priority, so there are a series of gender barriers that we have been able to detect from the perspective of our colleagues, especially financial advisory and business intelligence, and that

have allowed us to propose specific interventions for different clients [Root Capital Staff Member, Woman].

Staff mentioned that there can be more resistance to working on “gender mainstreaming” work in areas with higher concentrations of indigenous populations as they are perceived to be more resistant to shifting cultural norms or addressing more restrictive cultural norms, suggesting a need to embed a culturally sensitive perspective in the gender work. One staff woman shared that “there are things that perhaps will not change because customs cannot be changed, because they are customs of the region. So, it is not even from the cooperative but from the region and well, it is challenging. Little by little, the practices and customs have not changed in 500 years or before the arrival of the Spaniards and they remain as they are” [Root Capital Staff Member, Woman].

Nonetheless, staff described three key areas in which they provide support to address women’s economic empowerment and gender equity at the cooperative level. First, a key area where Root Capital has provided support is through a role analysis exercise, which has been perceived to support cooperative leadership in reflecting on and understand inequality between men and women serving in similar roles. For example, a staff member explained acute differences between men and women who work in an organization and common differences between men and women’s job security and pay,

[In] all the positions that women occupy, [women] are paid very, very lowly or they are definitely not paid. So, for example there are directors of the women's groups who do not have a salary, while the directors of the men's groups do. This is because men are the financial providers for their household, and women are not perceived as financial providers. So, women are not seeing themselves as financial providers, they are not seeing themselves as worth it either. But they are occupying a position, right? So, if a man is in a management position and a woman is in a management position, they'd have to pay her too, right? But she's a woman, so they pay her very little. If there is an economic cut, a need to cut staff, the first positions to fly are those of women. Or women have temporary positions, and most of the more permanent or decision-making

positions are men. Women occupy more temporary positions [Root Capital Staff Member, Woman].

The staff member then explained how Root Capital's advisory services target this type of inequity to not only improve equitable practices, but highlight the business case for doing so as well,

Well, we have worked on the analysis of the roles, what is required in the roles... so regardless of whether it is a woman or a man, what is required, and to evaluate...who is giving more within the position... And that it can also be put, for example, to quantify how much would an organization fail to earn due to staff turnover or because the person is not satisfied? And that regardless of whether you are a woman or a man, or a young person or an adult. I mean, how much are they losing because there is unproductivity caused by... or low productivity caused by job dissatisfaction, right? So, that too... it's something we're doing... well, I don't know if it's been done for a long time, but we've started doing it maybe three years ago and now also inserting the gender lens [Root Capital Staff Member, Woman].

Second, staff observed how normative expectations and responsibilities limit women's ability to participate fully in activities in ways in which they do not limit men. For example, women are responsible for caring for their children that are not in school during the day, or that women are normatively expected to ask for their husband's permission and approval to spend their time participating in a training or activity. Staff explained their observations in how these barriers limit women's participation,

One, taking care of the children, and two, perhaps the issue of their partners...Not in all cooperatives, but yes, asking for permission, which seems absurd to me, everyone knows what their family structure is like. I think the female members are willing to participate. They want to learn more, but many times they are limited by work at home, by taking care of the children. In fact, within the formal and social due diligence<sup>17</sup>, that is one of the questions we ask is if the cooperative provides a space for childcare, for example, when the general assembly is held. Some

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<sup>17</sup> The official term is *social and environmental due diligence*.

do have it, others don't. And since some women know that there is no such service, they leave their children at home. But that is complex for them. I think that if that is solved, they would be delighted [Root Capital Staff Member, Man].

Another staff member highlighted that the need for women to receive their husband's permission and approval was a key barrier that limited some women's ability to participate, "I believe that the most difficult obstacle for them is this relationship with their partner, that they do not receive permission or adequate support [to participate in trainings]" [Root Capital Staff Member, Man].

In response to these observations, Root Capital implemented a "third person policy" that allows women to bring an additional person with them to the Root Capital supported training or activity to either care for an accompanied child or their husband who would otherwise not allow them to travel by themselves. Root Capital would cover the food and lodging costs of this additional person, as explained by a staff member,

There is, for example, the third person policy, which is a person who may be accompanying a woman who is coming for training. It may be the husband, son, daughter or some close relative who is accompanying her because let's say the customs do not allow women to go out alone or they prefer that they go out accompanied. [With the third person policy], if the women are authorized to go out, then the third person can also come to be in support of the woman who has small children and who has to take them with her. They are in the same room sharing with the baby and you pay for everything, right? Food, lodging, work time is not paid, but let's say food, lodging and that way they can go with confidence [Root Capital Staff Member, Woman].

However, it is unclear from the interviews conducted for this study the extent to which this policy has enabled women to participate more in activities.

Finally, one staff member explained a newer approach to strengthen engagement with men clients who tend to be more resistant to accepting or requesting advisory services around gender and equity compared to other topics (such as engaging the next generation (youth), strengthening resilience, business management, and other services). Women were more likely to accept and request the gender and equity

advisory services. As described by one staff member, men are mostly only motivated to accept gender equity advisory services in response to external pressures from certification organizations or potential buyers who want to see equitable practices. However, men are hesitant to actually engage with the gender advisory services, as described by one staff member, who estimated that effectively all men members of FPOs with whom she worked had this hesitation,

[The men] have expressed to us the fear that now it is the women who are going to command, and that now they are the ones who are going to be in a situation of submission [Root Capital Staff Member, Woman].

In response, Root Capital staff explained that they are now employing an intentionally slow approach to present data and encourage self-reflections to shift attitudes among both men and women regarding gender equity. A staff member explained,

For example, right now we are at a stage where we are including masculinities in our work. We had started working with mixed gender groups to break this idea that talking about gender is [only] 'working with women'. No, talking about gender is talking about power relations between men and women, and men also have a word and a reflection and a change to make. And many of the barriers that women experience are if men do not listen to these things they do not change, even if they are pushing [for it]. So, we started working with mixed groups with interesting results... I think that this has been the most interesting part so far. It has been very well received. It is curious that we thought we were going to have a lot of resistance, but the truth is that men are also eager to be heard, which is also very interesting [Root Capital Staff Member, Woman].

## **DISCUSSION AND CONCLUSION**

This report describes the findings of a qualitative study of coffee cooperatives in Chiapas, Mexico and how Root Capital engages with them to advance women's economic empowerment, among other objectives. As part of this study, we aimed to describe the gender dynamics and roles and responsibilities of men and women in the coffee value chain in Chiapas, and the opportunities and barriers faced as a result of these dynamics. In this section, we discuss the implications of these findings and provide recommendations and feedback for consideration for developing and interpreting indicators to measure women's empowerment in market inclusion as well as for programming similar to Root Capital's approach to strengthen women's economic empowerment. We also suggest questions for future research.

### **Understandings of empowerment and gender dynamics in the coffee value chain**

There exist defined gender roles and divisions of labor at each node of the coffee value chain in Chiapas, and participants often described these roles as expected given social norms or perceived gender-specific limitations of natural abilities that would shape how men or women could engage in different activities. Men and women indicated that while men are in charge of coffee production activities, women do spend time contributing to cleaning and management activities, and that women are heavily involved in the coffee harvest. Both men and women explained that women are responsible for processing activities, which can be time consuming and laborious, but often occur close to the home. Many of the cooperative members interviewed for this study wanted to purchase a pulping machine to both reduce the effort women spent in pulping coffee cherries but also to improve productivity and efficiency during post-harvesting. However, they indicate they are limited to purchasing a machine due to a lack of access to credit options, both in the community and from the cooperative. Although the coffee harvest activities require physical labor in picking and carrying the baskets of ripened cherries, there is a perception that women cannot participate in other post-harvesting activities, such as transporting bags of coffee, because the lifting is too physically heavy of a task for women. Men are responsible for managing the sale of coffee and directly negotiating with the buyer to the extent that a negotiation happens. In instances when

buyers travel to the household as the point of sale, women can participate in sales, typically facilitating the sale under the direction of her husband. However, women still do not lift the coffee bags nor transport the bags for sale.

Households prefer to or sometimes need to hire labor to help with coffee harvest activities; men and women indicated that while they hire both men and women as laborers, they tend to hire men more out of preference or availability. Women explained that men are more often the ones seeking work as laborers on coffee farms, whereas men explained they prefer to hire men who are perceived as more capable working on coffee farms. Several participants had described that hiring labor also helps to ease the burden of women's roles during the harvest season, however it is unclear from this research the extent to which women's labor is reduced or supplemented with additional labor and how this affects women's time and agency. Future research can explore the dynamics of hired labor to on men's and women's empowerment within coffee producing households. And future research can also explore the extent to which women are perceived to be able to manage hired labor and any differences between laborers who are men versus women.

Additionally, although the effect of temporary outmigration was not raised as a key theme in this study, a few women had mentioned that their husbands had left the community in search of economic opportunities and left coffee production tasks to them. These women relied on hired labor to maintain the coffee production activities, however it is unclear the extent to which this dynamic shifts women's decision-making power over agricultural decisions or other household decisions. Future research can explore the effect of out migration of a household member on intrahousehold patterns of decision-making, including those regarding coffee and other agricultural activities.

Men and women interviewed for this study also described their perceptions and understanding of empowerment and elements of an empowered person with relation to engaging in the coffee value chain. Overall, while the concept of an empowered person was difficult for both men and women to relate to, they shared perceptions of how relations between men and women had changed over the years. Respecting women's rights or the perception of respecting women's rights was more acknowledged at the

time of the interviews than in previous years, and it was more common to see men and women both generating incomes for the household. Men and women shared different perspectives regarding attitudes toward intimate partner violence. Women acknowledged that while it commonly occurs towards women, it was typically treated as a private matter and discussing it would amount to gossip. There were also perceptions that women who are mistreated from their husbands may invite such due to a lack of self-respect. Men, on the other hand, acknowledged that men may mistreat their wives, but shared more concerns over women's reactions to mistreatment (such as unwanted advances) rather than the mistreatment itself. However, more research is needed to better understand the extent to which such attitudes and behaviors are normatively accepted, and how they influence intrahousehold and community dynamics around engaging in the coffee value chain and other productive activities, and strengthening women's empowerment.

Varying access to resources limited both men and women farmer's ability to advance in the coffee value chain, particularly access to credit, which was limited for both men and women in the study areas. Limited access to credit with favorable or reasonable terms limited men's and women's ability to hire additional labor on their coffee farm or to purchase machines that would reduce specifically women's time burdens within the household. Women's time use is constrained by expectations and normative tasks in ways that men are not constrained. While both men and women discuss that men do sometimes support in household chores, but it is unclear the extent to which this is true from this study and how this may influence women's time burdens. It is also unclear from this study to what extent that women require permission from their husbands to engage in certain activities outside of the household and how this acts as a barrier for women to upgrade or expand their position in the coffee value chain. Additionally, as both men and women are limited in accessing credit options, more research is needed to understand the extent to which men and women have different opportunities to access and or use credit to advance their own goals.

## **Gender dynamics in coffee cooperatives**

Members from both cooperatives included in this study shared differences in how they engaged with and benefitted from their respective cooperatives. The cooperative in MP2 provided more opportunities for members to directly engage in meetings, social activities, and capacity building opportunities whereas the cooperative in MP1 operated through a more decentralized structure and did not offer opportunities for members to directly participate in decision-making or meetings beyond the representation of their delegate. Most members interviewed from the cooperative in MP1 indicated that they had not been invited to meetings, social events, or capacity building opportunities and saw the cooperative as a consistent buyer rather than source of support. This represents a significant blockade for any benefit achieved at the cooperative level to “trickle down” to its members. On the other hand, members from the MP2 cooperative saw the cooperative as a consistent buyer who offered stable pricing and as a source of support and community to advance their coffee production and post-harvest processing activities. The cooperative in MP2 did orchestrate activities that included clear gender roles for membership activities, as women are responsible for cleaning and cooking related tasks and the men must manage the landscape around the warehouse and transport the coffee bags for sale.

Members of both cooperatives reported that a benefit of joining the cooperative was the stable pricing offered, which contrasted with the variable pricing offered by coyotes. Several members also reported that the cooperatives offered higher prices for their coffee than other non-cooperative buyers, which is consistent with other studies in the region (Trejo-Pech, Servín-Juárez, Reyes-Duarte, 2023). Additionally, a strong added advantage of farmers joining a cooperative was to benefit from organized transportation options to sell their coffee. Both farmers and other market actors explained that the lack of transportation means, including a truck, the cost of gasoline, and the time required to transport coffee beans, were key barriers faced by all producers in the region. By providing transportation options, cooperatives offer a comparative advantage and enable producers to avoid spending additional costs to bring their coffee to sale. This also enables women to be more involved in the coffee sales to the extent that women at home can manage the sale with a buyer who comes to retrieve the harvest at their home,

although it is still unclear how this may shift women's involvement in negotiating or deciding elements of the sale, or if it exacerbated women's already existing time burdens. Participants' description of the transportation options suggested that there is variation in which members are reached by such options and thus, variation in the extent to which this is a comparative advantage for all members, particularly those in more remote areas.

Finally, while women do participate to an extent in cooperative activities, it is perceived that normative barriers such as needing a husband's permission to participate or lack of confidence to speak in public limit women's ability to fully participate and benefit from that participation. It is also unclear to the extent that women chose to be a member in the cooperative rather than her husband, who is described as making the decisions around coffee production. Future research can explore the extent to which women may benefit personally from their participation the cooperative and can look across a variation of cooperatives to see which ones may be more effective in supporting women members compared to coffee producing households overall.

### **Root Capital's support to strengthen women's economic empowerment**

Finally, we explored the extent to which Root Capital's engagement with the cooperatives had supported activities or changes that strengthen women's empowerment by understanding members and leaders' perceptions of this engagement. Overall, considering Root Capital intervenes directly at the cooperative level and does not engage with members directly, and that they only recently began implementing the formal equity advisory services in November 2021 in Chiapas and only in 2023 with the included cooperatives, per the cooperatives' demand, there was a limited understanding in how these services may have influenced changes to strengthen women's empowerment.

However, cooperative leaders and members shared perspectives regarding their overall engagement with Root Capital beyond the specific gender equity services, and Root Capital staff shared observations that contributed to how they approach gender equity advisory services moving forward. Overall, cooperative members were generally unaware of Root Capital and its engagement with the

cooperative. Some members knew about Root Capital but were unaware of how it functioned, some thinking it was a bank and others thought it was a coffee buyer. However, those that were aware of Root Capital knew that it had provided a loan to their cooperative to purchase and maintain a truck, which was used to reduce barriers faced by producers to bring their coffee to the point of sale and also had implications for shifting gender roles to manage coffee sales as described in the previous section.

Finally, as Root Capital only recently began implementing formal gender equity advisory services in Chiapas, there is limited information to understand how these activities may be influencing cooperative operations, gender dynamics and roles, and perception of women engaged in the coffee value chain at the time of this study. However, Root Capital staff in Chiapas shared perceptions of unequal gender dynamics in the cooperative operations and how these may be affecting both individual empowerment as well as overall collective efficiency and effectiveness in their operations, and describe multiple strategies employed to address these challenges. Cooperative leaders did share that they felt Root Capital's engagement was limited in its reach and expressed a desire to reach their members more directly.

To address these findings and conclusions, we suggest several recommendations for consideration to strengthen Root Capital's programming approach to addressing gender equity with coffee cooperatives in Chiapas. We note that some aspects of these recommendations listed below include activities only recently initiated by Root Capital in other locations and could be introduced into Chiapas to intentionally improve both the scale and impact of their services on cooperatives and on their membership. These recommendations include:

- We suggest that Root Capital should consider conducting future evaluations to assess the influence their Gender Equity Advisory services have had on cooperative leaders, cooperative members, and the overall cooperative operations and management once the Gender Equity Advisory services have been implemented for longer periods of time.
- Root Capital and its Monitoring and Evaluation team should consider exploring the gendered impacts of its technical and advisory services that are not considered under the domain of their gender equity services. For example, Root Capital could research how their provision of credit to

the cooperatives may have influenced intrahousehold or collective gender dynamics or elements of women's empowerment.

- As cooperative members repeatedly explained that a lack of access to credit options was a significant barrier to expanding or upgrading their coffee production and post-harvesting activities. Root Capital could consider extending their suite of services to include a training or capacity building efforts at the cooperative level for cooperative leaders on how to deliver and manage credit to their members.
- As part of the formal Gender Equity Advisory Services, Root Capital should consider providing training or awareness building to address the aspects of unpaid care work that women disproportionately undertake to highlight the value of women's existing contributions to household, agricultural, and cooperative activities.
- Cooperative leaders observed that while they benefit from knowledge gained from Root Capital, they are not equipped with the skills to then train others (i.e., cooperative members) to disseminate learned knowledge and skills. Root Capital could consider strengthening a training of the trainer (TOT) approach to enable cooperative technicians or staff to be able to deliver similar trainings and capacity building opportunities to their members.
- Particularly on the topic of gender equity, it will be important for Root Capital to continue actively and intentionally engaging men at the cooperative to address normative stereotypes and barriers that limit both men and women's full participation and engagement in the value chain. And they can consider exploring a TOT model to expand these types of capacity building opportunities for its members with an aim to constructively address normative and structural barriers that women members, in particular, may face in fully participating in and benefitting from their cooperative membership.

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