Weinakademiker Thesis

SLOVENIAN "PENINA" AS AN EMERGING CATEGORY IN THE GLOBAL SPARKLING WINE MARKET

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ABSTRACT

Motivation for choosing this topic

My professional focus in wine for the last 20 years was dedicated to the discovery of new wine regions and contributions to their appearance on the World Wine Map. Approximately a decade ago, while I was tasked with introducing Ukrainian wines to the global market, I discovered Slovenia as a hidden treasure of Central European winemaking. However, Slovenian wines were almost unknown outside the country despite its involvement in the "orange wine revolution," close historical ties with Italy and Austria, a well-developed wine industry, and winemaking dating back to pre-Roman times.

The outbreak of full-scale war in Ukraine led me to Slovenia, where I immersed myself in exploring Slovenian wines as an insider. I found surprising the quality and variety of sparkling wines produced by the traditional method from indigenous and international grapes, called "Penina." Despite its growing recognition, Penina remains largely overlooked in academic literature and global wine professional training programs such as Wine & Spirit Education Trust (WSET), Court of Master Sommeliers (CMS), and The Institute of Masters of Wine. This thesis was therefore motivated by the need to conduct comprehensive research on the emerging category of Penina and contribute to its global discovery.

Problem/objective

This thesis aims to analyze the market positioning of Slovenian Penina as an emerging category of sparkling wines in the context of global market trends. The preliminary research outlined the controversy of the fact that Penina is still a relatively unexplored product category on a global scale. Meanwhile, the growing sparkling wine market trend creates opportunities for premium, terroir-driven sparkling wines made by the traditional method. The general research questions are, "Why is Penina important from a historical, viticultural, and marketing perspective? What are the possible barriers winemakers face when entering export markets?"

Methodology

Utilizing a mixed-methods approach, the research combines an analysis of recent global wine trade data (2020–2026) with a concept-related academic literature review and a primary expert survey conducted among 10 leading Penina's producers.

Content

The thesis contains five sections:

Section 1. Introduction

- The first section is aimed at assessing the concept of the "Sparkling Wine Revolution" and Slovenia's place in it: the latest global sparkling wine market trends in the context of recent international trade statistics, the shift of consumer

preferences, and environmental issues, which are influencing both supply and demand.
- The objective of the thesis will be indicated: What makes Penina an emerging category in the global sparkling wine market?

Section 2. Slovenian sparkling wine tradition: a historical overview and contemporary interpretation

- The second section describes the history, tradition, and modern definition of Penina in Slovenia.
- The first official record of the term "Penina" includes a comparative analysis of Penina's position within the pan-European context of sparkling wine history.
- Modern requirements for Penina are outlined according to current legislation. Can every Slovenian sparkling wine be called "Penina"? Is this term exclusively associated with the traditional method of production?

Section 3. Unknown Slovenia: key wine regions in the realm of sparkling wine production

- The third section defines key features of the grape-growing environment and winemaking of Penina in Slovenia. Slovenian sparkling wine map: three regions—plenty of micro-terroir reflections and how they contribute to the Penina production, quality, and unique selling point.
- Dolenjska is an emerging wine region with the coolest mesoclimate in Posavje. What prospects does global warming open up for the regional sparkling wine production? How does the indigenous variety Žametna Črnina influence the differentiation of this category?

Section 4. Export potential of the Penina in the international markets

- This section aims to prove the "emerging" status of Penina through export and market data and to conduct an analysis of global trends versus Slovenian heritage.
- The section covers the challenges and opportunities for Penina producers in the international market, using the SWOT model, based on the producers' survey (experts' interviews) and the research findings.
- The discussion is offered as to the market positioning of Penina internationally, which helps producers make better strategic decisions and therefore provides the practical implications of the study's results and findings.

Section 5. Conclusion

The results reveal that while Slovenian producers achieve high technical benchmarks—often exceeding legal aging requirements—at competitive prices, the primary barrier to global entry remains the lack of a cohesive Penina soft brand identity. Furthermore, the insufficiencies of existing legislation, which leaves Penina in a dual status without linking it to a traditional production method, can confuse the consumer. The study concludes that the future growth of the Penina category lies in a "boutique" positioning strategy that emphasizes indigenous varieties and sustainable production, providing a distinct alternative to mass-market competitors and a targeted Penina promotion among wine professionals, including international wine educational systems and entities.