

Policy Brief: Digital Product Substantiation - proving Mānuka Honey is the real deal

Key Points

There is growing demand for product-level information to substantiate claims:

- Information exchange across value chains currently operates as a series of closed, point-to-point, paper or PDF-based ecosystems that are not interoperable
- Global markets are moving toward a new baseline: trusted, verifiable, digital product information that spans the entire value chain
- This approach would protect consumers, strengthen the credentials of national products, and unlock higher export premiums – particularly for authenticity and sustainability.

We used New Zealand Mānuka honey as a case study to test these trends:

- All respondents agreed export markets are far more demanding than in the early 2000s—more claims, more testing, more certificates, more requirements.
- The pressure comes from both markets (buyers, final consumers, platforms) and governments (import requirements or via regulation of firms).
- The demands include a mix of hard, testable requirements (e.g. glyphosate, MGO levels) and credence requirements (e.g. organic, halal, origin)
- Almost all expect these requirements to keep increasing—making scale more important, and most see substantiation shifting from one-off listing checks (“Can I trust you? And your product?”) to ongoing proof at shipment or even batch level.

Value chain complexity requires smarter ways of working, competitiveness requires it, but systems and processes are not up to it:

- Some New Zealand honey producers are already benefiting from digital methods (e.g. digital labels) to substantiate product attributes and address authenticity and sustainability metrics.
- Yet a proliferation of standalone, overlapping claims and standards persists – each backed by audit and testing regimes of varying rigour
- Compliance is still mostly handled through ad hoc tools (e.g. emailed PDFs)
- Some digital systems are emerging, albeit that some are either only government-to-government (e-Cert) or proprietary (e.g. Amazon Transparency)
- System-wide leadership is required to drive adoption of digital systems that underpin trusted brands and trusted regulatory frameworks.
- New Zealand’s action plan to double the export value generated by the primary sector needs to include using trusted, verifiable, digital product information.

Policy Brief: Digital Product Substantiation - proving Mānuka Honey is the real deal¹

Using digital product-level information to substantiation claims

This brief summarises the potential of digital systems to support the substantiation of product attributes and address authenticity and sustainability claims across value chains. We undertook desktop and interview-based research using New Zealand Mānuka honey as a case study and tested our findings in an industry workshop. Mānuka honey was selected to understand what information is currently sought by customers, how that information is shared digitally, what further opportunities exist, and what lessons apply to other export sectors. The accompanying report (Digital Product Substantiation – the case of Mānuka Honey, NZPECC 2026) provides further detail.

NZ needs to protect its reputation for quality products and systems

New Zealand's economy is built on exporting. The current New Zealand Government set an ambition to double export value within ten years. That value rests on New Zealand's reputation for high-quality, high-value products and systems – a reputation that has been well earned in global markets. But the rules are changing, and New Zealand exporters and export systems need to be ready.

Currently no single source of truth but....

Customers must be able to trust that products are what they claim to be – especially when paying a premium. Certifications and claims must be backed by evidence. Information exchange across value chains remains fragmented. Traditional point-to-point certificates (paper or PDF) struggle to meet regulatory expectations, consumer demands, or supply-chain complexity. Customers increasingly expect evidence-backed claims from authoritative sources; some about product authenticity, others on sustainability. Without scalable digital substantiation, claims become inconsistent, unverifiable, and vulnerable to fraud, greenwashing, and challenge.

.... the game is changing: exporters and export systems need to be ready

Although jurisdictions and markets are moving at different speeds – and requirements occasionally stall – the long-run direction of travel is clear. Across all product categories, competent authorities, procurers and consumers are asking: *What is the product? What is it made from? How was it made? Who made it? Where has it been? Why should I buy it? Can you substantiate claims?* (see Stevens (2026) for more details).

¹ New Zealand Pacific Economic Cooperation Council Project Team: Rebecca Berendt, Peter Stevens Derek Gill.

New Zealand needs to catch the rising tide ... or be left stranded

Global markets are moving toward a new baseline: trusted, verifiable, digital product information attached to every product that spans the entire value chain. The global trend is moving from “trust in the logo” and the supporting certification systems to “show us your evidence” – substantiate with proof. What is new, and driven by regulators, procurers and consumers, is an emerging demand for transparency disclosures that necessitate reporting and substantiation of claims shared across *entire value chains*. Such disclosures are *qualitatively* different to simpler point-to-point product substantiation requirements for finished goods. This is because actors are required to share information throughout the value chain, with key data aggregated from source to point of consumption.

How Mānuka Honey illustrates these trends

Honey is one of the most adulterated products on the international market. This makes it highly vulnerable to fraud, counterfeiting and mislabelling. New Zealand Mānuka honey commands a significant premium: a 250-gram jar of UMF 24+ retails for \$330, with some UMF 35+ products on the market at \$2,500². This premium is primarily driven by perceived health benefits but is underpinned by robust certification and proof of country of origin.

Protecting trusted brands from a race to the bottom

New Zealand is uniquely placed to protect against downside risk from false claims and realise the upside gains from higher price premiums for Mānuka Honey. MPI’s regulatory system is the foundational layer, supporting authenticity of Mānuka as it leaves the New Zealand border, but fraudulent incidents risk undermining trust in New Zealand’s brands. Trusted brands backed by robust systems are needed to avoid a race to the bottom.

Multiple test-based standards and credence claims

Mānuka products come with a bewildering array of additional certifications and claims – our research identified over 20 potential icons on labels that could be used on honey jars -organic and UMF are two examples of this (see graphic for examples). A UMF claim can be verified with specified laboratory protocols. However, credence claims such as ‘Organic’ cannot be tested for – so attestations rely on documentation and whole of value claims.

² <https://tinyurl.com/Honey-prices>

Examples of grading and certification logos used by interviewed exporters:



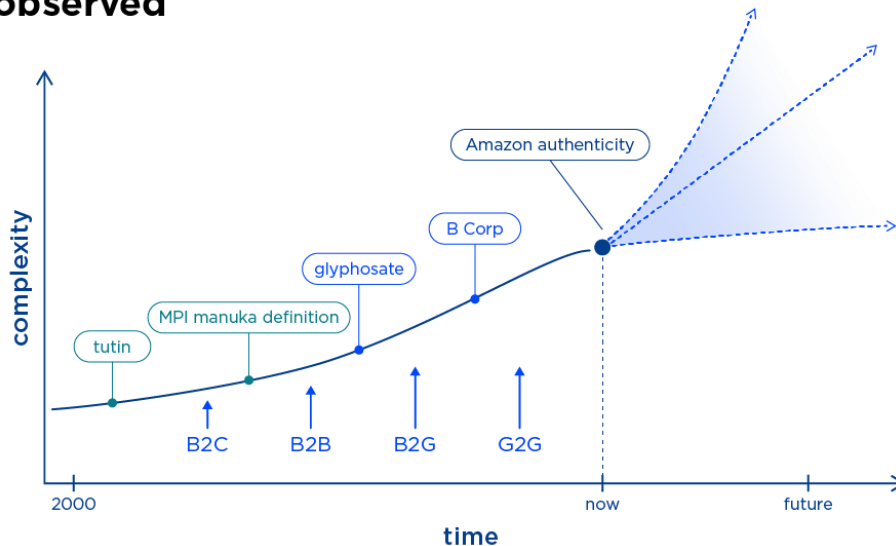
Key Mānuka honey stakeholders' views on practices and trends

Nine key industry stakeholders were interviewed to understand how they share information, validate claims, and how digital standards could help. Key findings were:

- All respondents agreed export markets are far more demanding than in 2000/2010—more claims, more testing, more certificates, more requirements.
- All agreed the pressure comes from both markets (buyers, consumers, platforms) and governments (export/importing requirements via regulation on firms)
- All saw a mix of hard, testable requirements (e.g. glyphosate, MGO levels) and credence requirements (e.g. organic, halal, origin)
- Most expected these requirements to keep increasing—making scale more important
- Many said compliance is still handled through ad hoc tools (e.g. emailed PDFs), though some digital systems are emerging that are either government-to-government (e-Cert) or proprietary (e.g. Amazon Transparency)
- Many see substantiation shifting from one-off listing checks (“Can I trust you?”) to ongoing proof at shipment or even batch level.
- Māori participants stressed the value of linking products to indigenous values, sustainability practices, and community outcomes. They highlighted a strong emphasis on provenance, whakapapa, kaitiakitanga (guardianship), sustainability, and alignment with tikanga Māori and Te Ao Māori values as key sources of market differentiation.

What we've observed

In comparison with 2000/2010, the export market has become much more demanding in terms of product substantiation (claims made, testing, certificates, requirements in general etc).



How Digital Product Substantiation Works

Digital systems enable evidence to be shared more easily and more widely. At the same time, greater reliance on emerging digital technologies requires appropriate guardrails – how can users know the information is trustworthy?

Digitisation required standardisation

The global retail supply chain has collaborated on this challenge for decades, using digital standards to share product master data across food and grocery, healthcare, and building products. Digital labels extend this capability to a far broader audience – regulators, customs authorities, and consumers alike. The key enabler is interoperable digital standards.

What will Digital Product Substantiation look like?

Digitalisation has the potential to deliver the same transformation in logistics and value chains in the twenty-first century that containerisation and barcodes delivered in the late twentieth. This transition would unfold over time:

- Near-term: digital labels via '2D barcodes' or Radio-Frequency Identification (RFID); online product pages with substantiated claims
- Medium-term: machine-to-machine' data exchange across supply chain actors
- Long-term: digital trust layers enabling real-time verification using secure digital identity systems.

International Direction of Travel - Why Action Is Needed Now

Global trade is shifting toward digital transparency. Global markets will increasingly require machine-readable data from an authoritative, trusted source, rather than manual reporting systems that cannot scale up. APEC (2026) and UN/CEFACT Recommendation 49 both discuss the imperative to establish global norms for transparency, Digital Product Passports, and verifiable digital certificates and we are seeing pilots and systems being developed across Asia-Pacific, including Australia. Economies that delay risk exclusion from high-value markets.

Achieving substantiation at scale will generate significant benefits

To get ready for this new global baseline both government and industry need to recognize it and get ready to be able to provide substantiation at scale – i.e., throughout the value chain. New Zealand's action plan to double the export value generated by the primary sector within ten years needs to include using trusted, verifiable, digital product information. Early adoption of Digital Product Substantiation will protect and grow New Zealand exports. Specifically, it will allow:

- Improved market access through strengthening authenticity and sustainability claims
- Stronger national brands via verifiable clean, green claims
- Reduced compliance costs through standardised digital systems
- Faster border processing and reduced fraud through digital credentials
- Sector-wide efficiency from interoperable systems
- Network effects: the more businesses and government regulators adopt the architecture, the more valuable it is to everyone in the club.

Realising these gains requires a partnership by industry & government

These network benefits cannot be realised through bottom-up, incremental change alone (Gill 2026). Transformation requires digitalization (automations, machine-to-machine interactions, AI-supported systems), all of which require standards and interoperable systems – and that demands a top-down commitment to sustained collaboration between Government and Industry. Without government co-leadership of a sector-wide approach, the full potential will not be realised.

Key references

APEC (2026) *‘Improving Supply Chain Transparency with Digital Exchange of Traceability and ESG (Environmental, Social and Governance) Credentials to Facilitate APEC Trade Flows’*

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Stevens, Peter (2026) *‘Product Claims, Substantiation and Climate-Related Disclosures in the Value Chain through Digital Standards’*, unpublished paper for NZ PECC.