

Export Potential Brief

Opportunities for Jordanian processed food



International
Trade
Centre

About the paper

The export potential brief, prepared by the Trade and Market Intelligence (TMI) section at ITC, presents quantitative information on trade trends and export prospects of Jordan's processed food, based on the TMI tools Trade Map and Export Potential Map.

The brief is part of a broader initiative requested by the Foreign, Commonwealth & Development Office (FCDO) under the UKTP Programme aimed at enhancing the competitiveness and market access of Jordan's key sectors. The project will focus on supporting SMEs in several key areas: improving their branding and marketing strategies, securing necessary certifications for market access, and facilitating participation in international trade fairs. The project will also raise SMEs' awareness of the comprehensive requirements for entering markets. To assist companies, specialized experts and sales representatives will work directly with SMEs to identify and connect with potential buyers.

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For more information on the ITC export potential methodology, see: <https://exportpotential.intracen.org>

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Contents

About the paper	ii	
Acknowledgements	ii	
Acronyms	v	
Chapter 1	Overview of Jordanian export trends and prospects	2
	Trade deficit despite strong export growth	2
	Sectoral concentration and reliance on mineral-based products	2
	Top five destinations dominate export markets	3
	A data-driven approach to identifying export potential	3
	What sectors have export growth opportunities?	4
	Which markets hold the greatest potential?	4
	Zooming in on Jordan's processed food sector	5
Chapter 2	Jordan's trade in processed food	8
	Steady growth for exports of processed foods	8
	Processed food exports are still primarily destined to MENA countries	8
	Jordan's competitors in its main markets.....	11
Chapter 3	Jordan's export potential in processed foods	14
	Key markets for potential export growth: MENA and beyond	14
	Opportunities in MENA.....	15
	Opportunities in the European Union.....	15
	Opportunities in the United Kingdom.....	16
	Opportunities in the rest of the world.....	16
Chapter 4	NTMs and market acces	20
	High incidence of NTMs.....	20
	The most frequent NTM: conformity assessment	20
	Challenges originate abroad, but could be addressed locally	21
	Fees, delays and an abundance of documents: the most frequent procedural obstacles	21
	Implications and path forward	22
Chapter 5	Conclusions	25
Annex		28

List of figures

Figure 1	Jordan's trade over the last decade	2
Figure 2	Key concepts on export potential	3
Figure 3	Jordan's unrealized export potential, by sector	4
Figure 4	Jordan's unrealized export potential, by sector and market	4
Figure 5	Jordan's trade balance in the processed food sector	8
Figure 6	Jordan's shares of processed food exports, by market	9
Figure 7	Jordan's processed food exports to MENA by country (2009-2023)	9
Figure 8	Processed food exports, by product and market	10
Figure 9	Tariff (dis)advantage in main markets	11
Figure 10	Unrealized export potential in processed food, by market	14
Figure 11	Unrealized export potential in MENA by product and market	15
Figure 12	Unrealized export potential in the EU by product and market	16
Figure 13	Unrealized export potential in the UK by product	16
Figure 14	Unrealized export potential in the rest of the world, by product and market	17
Figure 15	Types of NTMs faced when exporting processed food, by partner region	20
Figure 16	Source of the challenges faced when exporting processed food	21
Figure 17	Types of domestic procedural obstacles, by partner region	22
Figure A. 1	Unrealized export potential by product and MENA market	28

Acronyms

EU	European Union
EPM	Export Potential Map
FAO	Food and Agriculture Organization
FTA	Free Trade Agreement
GAFTA	Greater Arab Free Trade Area
ITC	International Trade Centre
MacMap	Market Access Map
MENA	Middle East and North Africa
NTMs	Non-Tariff Measures
NAFTA	North American Free Trade Agreement
POs	Procedural Obstacles
UK	United Kingdom
UNIDO	United Nations Industrial Development Organization
US	United States



CHAPTER 1

Overview of Jordanian export trends and prospects

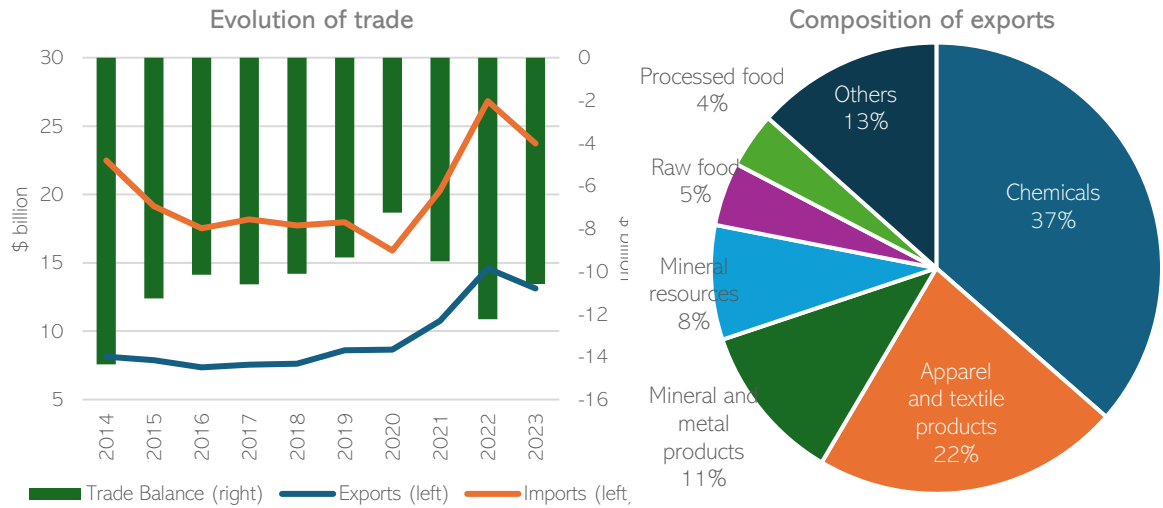
CHAPTER 1

OVERVIEW OF JORDANIAN EXPORT TRENDS AND PROSPECTS

Trade deficit despite strong export growth

Jordan's imports have consistently surpassed its exports over the last decade, resulting in a trade deficit that stood at over \$10 billion in 2023 (Figure 1, left). However, exports have shown sustained growth, averaging an annual increase of 5.5% over the same period—more than twice the global export growth rate.¹

Figure 1 Jordan's trade over the last decade



Note: the figure on the right reflects the average of exports between 2019 and 2023.

Source: ITC Trade Map (2025).

Sectoral concentration and reliance on mineral-based products

Exports of chemicals, which account for over a third of Jordan's exports (Figure 1, right), were one of the key drivers of this trend. Other key export sectors include apparel and textile products (22%), mineral and metal products (11%), mineral resources (8%), raw food (5%) and processed food (4%).²

While these key export sectors span multiple industries—demonstrating a broad range of competencies across manufacturing, mining, and agriculture—they collectively account for over 85% of Jordan's exports, signalling the concentration of the export structure.³ Moreover, a large share of exports from these sectors is reliant on natural

¹ Growth rates refer to compound annual growth rates.

² The sectoral shares are calculated over the average exports between 2019 and 2023. Unless otherwise specified, all trade values in the brief correspond to 2019-2023 averages.

³ Despite this apparent concentration, common indicators of export diversification—such as the number of distinct exported products and the equivalent number of products exported (which adjusts for export concentration beyond product count)—do not categorize Jordan as having a highly concentrated export base. Jordan exports 2,848 different products, compared to 1,411 in least developed countries (LDCs), 2,455 in other developing countries, and 2,609 in developed economies. Similarly, in terms of equivalent products, Jordan scores 40, significantly higher than LDCs (8.1), other developing countries (18.9), and even developed economies (29.3). However, these figures may overstate Jordan's export diversification due to the detailed product classification in the apparel sector, which artificially inflates product counts.

resources, particularly minerals.⁴ This dependence presents potential vulnerabilities in the face of fluctuating global commodity prices and long-term sustainability concerns.

Top five destinations dominate export markets

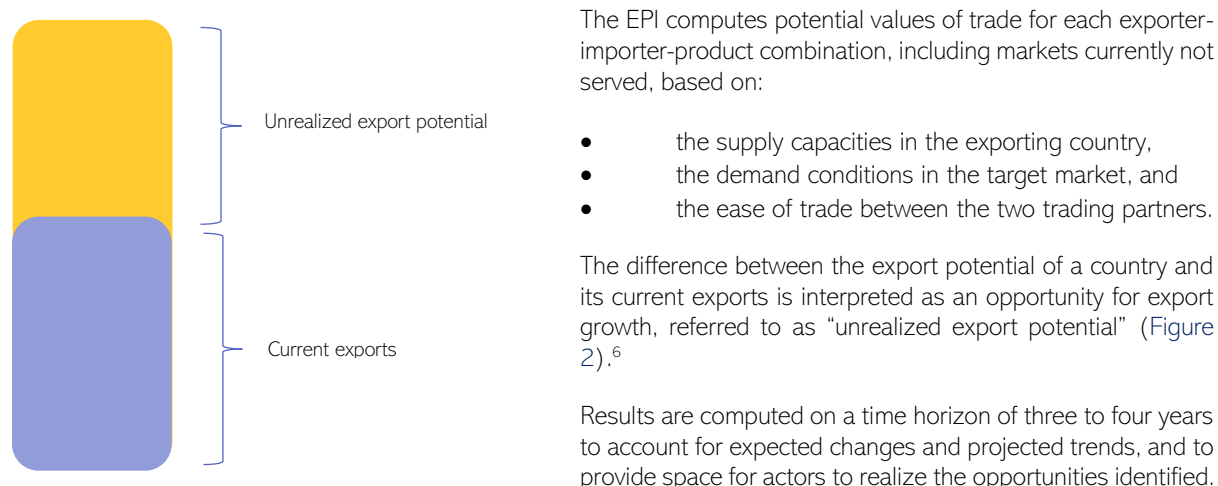
The concentration of exports is not only present in their sectoral composition but also in their geographic distribution. Jordan's exports show significant market concentration, with the top five export destinations—the United States (26%), India (16%), Saudi Arabia (13%), the European Union (6%), and China (6%)—accounting for over two-thirds of total exports.⁵ Additionally, countries in the Middle East and North Africa (MENA) region collectively represent 28% of exports. The reliance on a limited number of markets also increases vulnerability to external shocks.

In this context, leveraging existing data is essential to identifying opportunities to expand Jordan's exports—not only to strengthen trade in established sectors and markets but also to explore emerging industries and new global destinations.

A data-driven approach to identifying export potential

ITC developed an export potential indicator (EPI) to identify opportunities for growth of existing exports and market diversification. The EPI quantifies the export potential of a country across products and markets through an assessment of detailed information on trade, tariffs, and other factors.

Figure 2 Key concepts on export potential



Source: ITC Export Potential Map (2025).

The findings presented in this brief are, therefore, estimates of the export potential of Jordan's products by 2028. These results can then be compared to the current export values to identify growth opportunities. Note that, for any given product, the unrealized export potential may refer to opportunities to increase exports to an existing partner or, importantly, to opportunities to diversify into new markets. Additionally, the unrealized export potential may be associated to changes expected in coming years, such as growth trends or tariff changes, or to currently existing frictions.

⁴ While chemicals constitute over a third of total exports, nearly half of the sector's exports consist of potassium chloride, phosphoric acid, and phosphate-based products, which are mineral-based fertilisers. This, combined with the 8% share of primary mineral resources and 11% share of mineral and metal products, highlights a strong reliance on mineral-based exports.

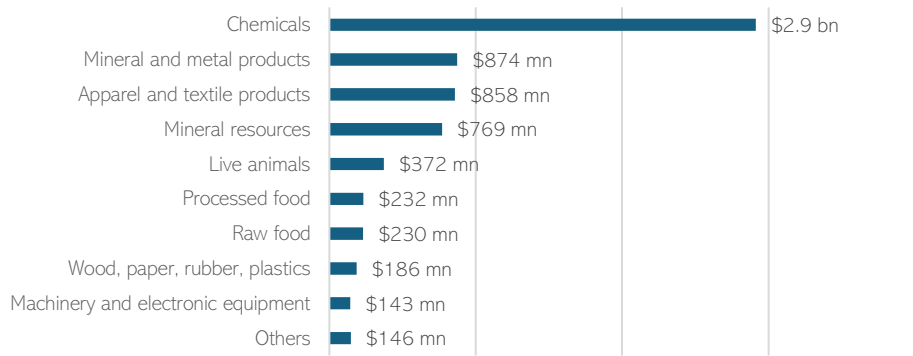
⁵ Usual market diversification indicators, namely the number of partner countries and the equivalent number of partners (which adjusts for the concentration of exports among partners), support this assessment. Between 2019 and 2023, Jordan exported to an average of 149 partner markets, compared to 138 for LDCs, 157 for other developing countries, and 159 for developed countries. More importantly, the distribution of Jordan's exports among these partners resulted in an equivalent number of partners of 8.3, compared to 6.3 for LDCs, but more concentrated than the 9.5 for other developing countries, and 10 for developed economies.

⁶ For details on the methodology, see: Decreux, Y. & Spies, J. (2023). Export Potential and Diversification Assessments. ITC, Geneva, 2023. Available at: https://umbraco.exportpotential.intracen.org/media/cklh2pi5/epa-methodology_230627.pdf.

What sectors have export growth opportunities?

By 2028, Jordan's unrealized export potential—the estimated space for export growth—is projected to reach \$6.7 billion, distributed across multiple sectors (Figure 3). Chemicals lead with \$2.9 billion in untapped export potential, followed by mineral and metal products (\$874 million), apparel and textile products (\$858 million), and mineral resources (\$769 million).

Figure 3 Jordan's unrealized export potential, by sector



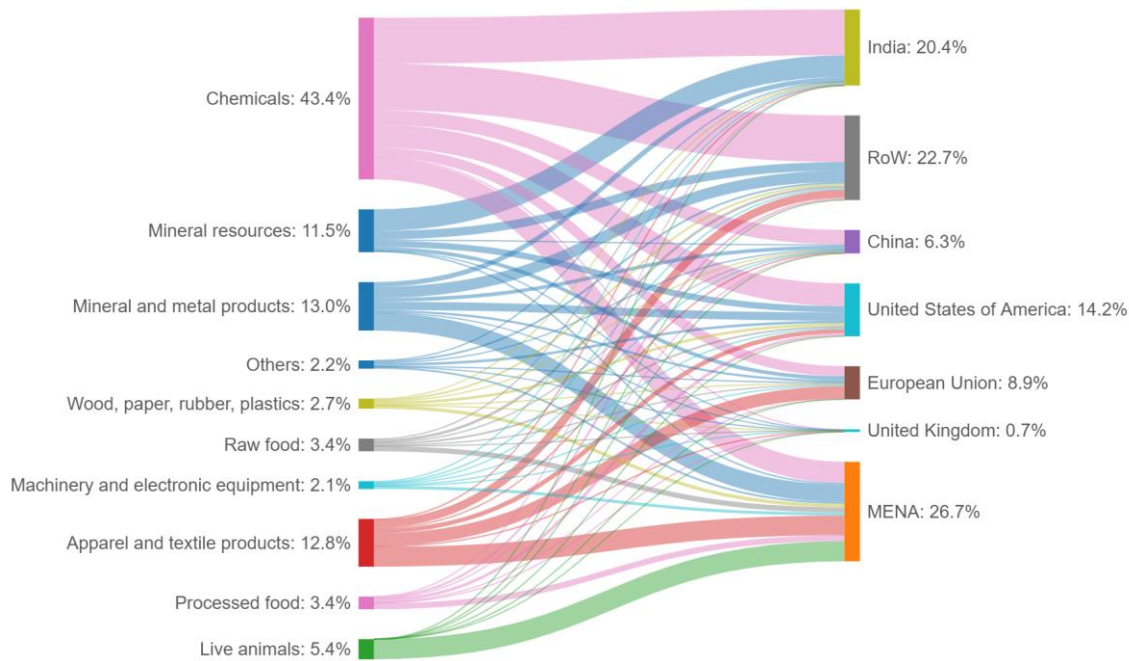
Source: ITC Export Potential Map (2025).

While these sectors, which currently dominate Jordan's exports, also hold the highest potential for future growth, smaller, emerging sectors show promising opportunities as well. Notably, live animals (\$372 million), processed food (\$232 million), and raw food (\$230 million) exhibit significant untapped export potential, highlighting opportunities for expansion beyond the main industries.

Which markets hold the greatest potential?

The MENA region presents the most significant opportunity for Jordan's export expansion by 2028, accounting for over a quarter (26.7%) of the country's untapped export potential (Figure 4). Other key export partners also show room for further growth. Notably, export growth opportunities extend beyond traditional partners, with the rest of the world (RoW) holding nearly a quarter (22.7%) of Jordan's untapped export potential—a substantial share of this concentrated in the chemicals sector.

Figure 4 Jordan's unrealized export potential, by sector and market



Source: ITC Export Potential Map (2025).

While the untapped potential across key sectors is distributed global among trade partners, smaller and emerging sectors—including live animals, processed food, and raw food—show a higher concentration of growth opportunities in the MENA region. This underscores the region's demand for these products and its ease of trade with Jordan—a strategic opportunity to enhance exports in these industries.

Zooming in on Jordan's processed food sector

Among others identified above, the processed food sector in Jordan stands as a pivotal sector with significant growth prospects, both domestically and internationally. Recognizing the strategic importance of this sector, the Jordanian government, in collaboration with international organizations, in particular FAO and UNIDO, has prioritized its development. Initiatives under the Jordan Economic Modernization Vision aim to enhance agricultural productivity and promote value-added activities, including food processing, to increase profitability and reduce post-harvest losses. Furthermore, the National Food Security Strategy 2021–2030 emphasizes the need for a robust food processing industry to ensure food security and stimulate economic growth.

Despite challenges such as reliance on imported raw materials and regional political instability affecting traditional markets, the processed food sector has demonstrated resilience. A deeper analysis to support efforts to tap into new markets and foster export growth is warranted to unlock the full potential of the processed food sector, contributing to economic diversification and trade balance improvement.



CHAPTER 2

Jordan's trade in processed food

CHAPTER 2

JORDAN'S TRADE IN PROCESSED FOOD

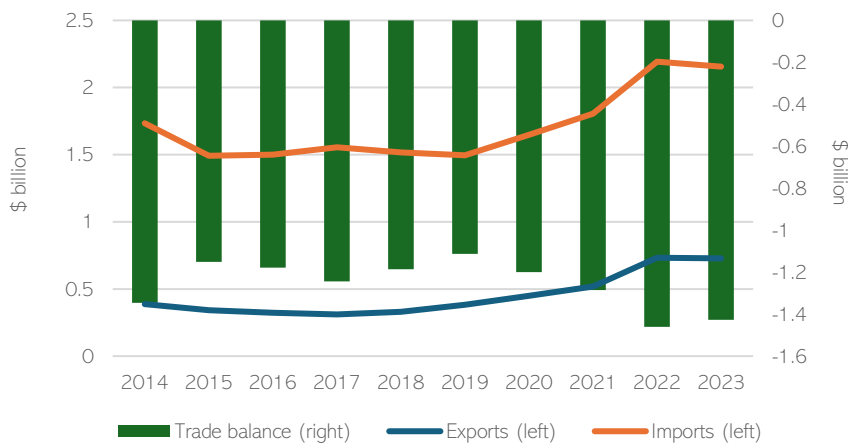
Steady growth for exports of processed foods

Jordan's processed food sector has maintained a persistent trade deficit over the past decade (Figure 5). Since 2014, this deficit has remained relatively stable, ranging between -\$1.1 billion and -\$1.5 billion, with a slight widening in 2022–2023.

Despite the ongoing deficit, the sector has demonstrated robust export growth. Exports have risen steadily from approximately \$387 million in 2014 to over \$728 million in 2023, reflecting an average annual growth rate of 7.3%—outpacing the country's overall export growth rate of 5.5%. This upward trajectory has accelerated in recent years, particularly in 2022, when exports surged by 41%.

The expansion has been driven by key product categories, including chocolate and sugar confectionery, wheat or meslin flour, sausages, processed cheese, prepared nuts, and bread and pastry products.

Figure 5 Jordan's trade balance in the processed food sector

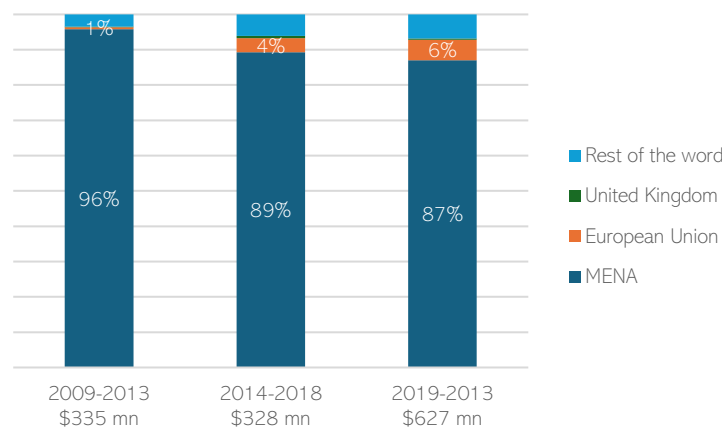


Source: ITC Trade Map (2025).

Processed food exports are still primarily destined to MENA countries

Historically, Jordan's processed food exports have been primarily directed toward MENA partners (Figure 6). While the region's share in Jordan's total processed food exports declined from 96% in 2009-2013 to 87% in 2019-2023, the absolute value of exports to MENA saw significant growth, rising from \$321 million to \$546 million over the same periods. These regional exports benefit from zero tariffs under the Greater Arab Free Trade Area (GAFTA).⁷

⁷ Members of the GAFTA include Algeria, Bahrain, Comoros, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, the State of Palestine, Qatar, Saudi Arabia, Somalia, Sudan, Syrian Arab Republic, Tunisia, the United Arab Emirates, and Yemen.

Figure 6 Jordan's shares of processed food exports, by market

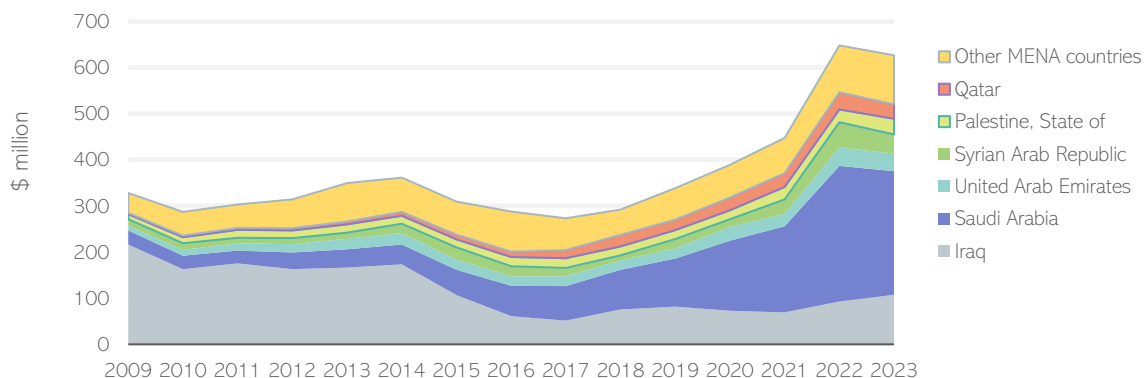
Note: Export shares are based on averages of export values, with more weight given to recent years.

Source: ITC Trade Map (2025).

In fact, exports of processed food to the MENA region almost doubled from around \$328 million in 2009 to over \$627 million in 2023 (Figure 7). This growth was primarily driven by Saudi Arabia, the leading destination market in the region, with exports surging from \$31 million to \$268 million during this period, largely due to increased shipments of sausages and sugar confectionery products. The substantial growth in Saudi Arabia-bound exports reflects strengthened bilateral economic ties, particularly through improved land transport connectivity agreements and trade liberalisation measures.

In contrast, exports of processed food to Iraq have experience a significant decline since 2009. Once the dominant destination with \$216 million in exports in 2009, exports to Iraq plummeted to \$51 million by 2017 due to regional instability, border closures, and increased competition from Turkish and Iranian suppliers.⁸ The reopening of the Karameh-Turaibil border in 2017, alongside other measures such as Jordan's exemption from Iraqi customs, has facilitated a partial recovery, with exports reaching \$108 million in 2023.

Other key markets in the region are the State of Palestine and the United Arab Emirates, at approximately \$25 million each, and Qatar at \$22 million.

Figure 7 Jordan's processed food exports to MENA by country (2009-2023)

Source: ITC Trade Map (2025).

While Jordan's MENA partners have remained the main markets for processed food exports for more than the last decade, Jordan has also established a solid presence in markets beyond MENA. The EU has gained importance in the processed food export basket, increasing its share in Jordan's exports from 1% in 2009-2013 to 6% in 2019-2023 (Figure 6), with exports reaching close to \$37 million, largely destined for the Netherlands (\$14.6 million) and Germany (\$7.1 million),

⁸ Between 2009 and 2017, Jordan's processed food exports to Iraq saw the sharpest declines in food preparations and bovine offal products.

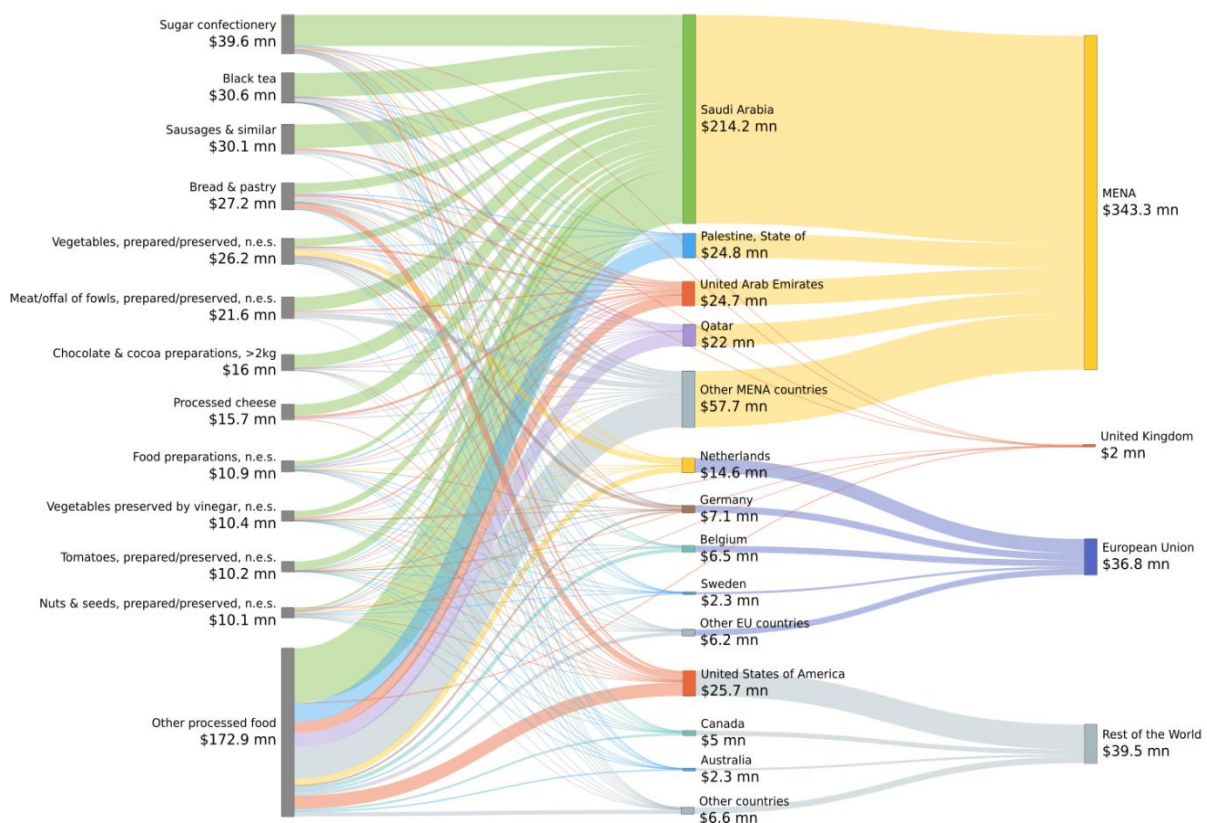
The United States is another key market at \$26 million. Both the European Union and the United States offer favourable trade terms through bilateral agreements - the Jordan-EU Association Agreement provides preferential access with an average tariff of 1.2% for processed food, while the Jordan-US Free Trade Agreement ensures duty-free entry to the US market.

Jordan's processed food exports reveal distinct product specialization patterns across different markets (Figure 8). Besides being the dominant market, the MENA region, in particular Saudi Arabia as the largest importer, receives imports a diverse range of processed food products from Jordan, such as sugar confectionery, black tea, sausages, bread and pastry, processed cheese, and preserved vegetables. Other significant importers in the region, such as Palestine, the UAE and Qatar also show a similarly broad-based demand for Jordanian processed food.

Conversely, the European Union's product selection is more specialized, with an emphasis on food preparations, processed cheese, and preserved vegetables. Similarly, the data suggests that the United States market focuses on select products, including processed cheese, confectionery, and other prepared foods.

Countries outside MENA, the European Union, and the United States receive fewer, more fragmented, exports of processed food from Jordan, with no dominant product category.

Figure 8 Processed food exports, by product and market



Note: Export values presented in the figure correspond to 2019-2023 averages.

Source: ITC Trade Map (2025).

Jordan's processed food exports exhibit strong regional specialization, with MENA dominating in volume and variety, while other markets show niche preferences for select products. MENA imports a broad range of products in large volumes, with Saudi Arabia as the primary market. The EU and the US import more selectively, focusing on specialty and processed food products, while other regions import minimal amounts, indicating lower demand or market penetration.

Jordan's competitors in its main markets

Jordan holds relatively small shares across its key processed food export markets. It accounts for 5.5% of processed food imports in the State of Palestine, 2.2% in Saudi Arabia, and 1.6% in Qatar, while its share in other key destinations remains below 0.05%.

In Saudi Arabia, Jordan's primary market for processed food, the European Union is the leading supplier, accounting for 31% of imports. MENA countries follow with 29%, with over a third of that coming from the United Arab Emirates. Other major suppliers include Malaysia (6%), the United States (5%), and Indonesia (5%). Under GAFTA, Jordan and the United Arab Emirates benefit from zero-tariff access, whereas other suppliers face, an average tariff of 5.8%.

The State of Palestine is highly integrated regionally in its processed food supply, with MENA countries providing 79% of imports, followed by the European Union (15%). Key regional suppliers such as Egypt, Saudi Arabia, Jordan, the United Arab Emirates, and Oman enjoy duty-free access under GAFTA. In contrast, other major suppliers—including Türkiye, the European Union, and Ukraine—face higher tariffs ranging from 8.4% to 10.6%.

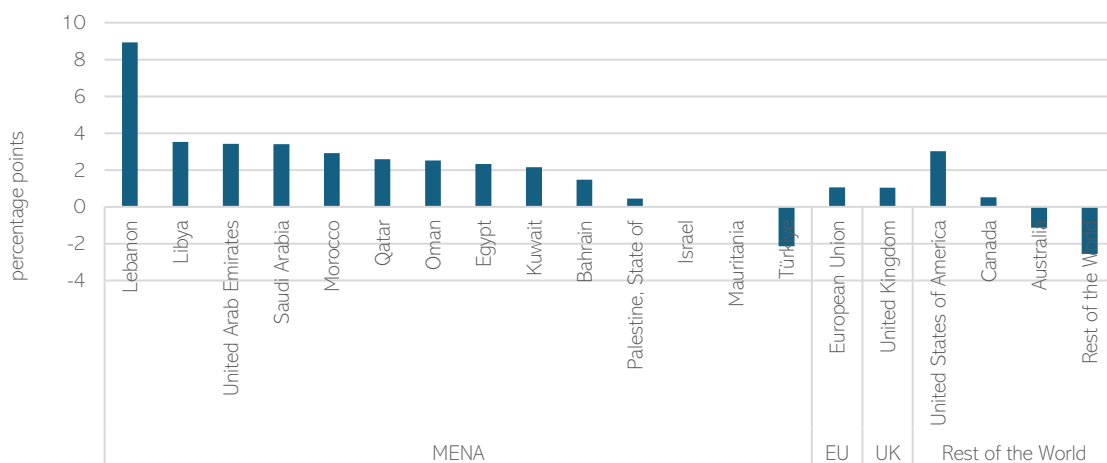
In the United Arab Emirates, the processed food import market is more diverse. The European Union (23%) and MENA countries (19%) lead, though Jordan's share is just 0.3%. Other significant suppliers include India (10%), the United States (5%), New Zealand (5%), and Malaysia (5%), followed Indonesia, the United Kingdom, Türkiye, and Canada with smaller shares. Among these, only Saudi Arabia shares Jordan's zero-tariff advantage under GAFTA, while other suppliers face an average tariff of 4.6%. Qatar follows a similar pattern, with the European Union, MENA, India, Türkiye, the United States, Malaysia, and the United Kingdom as key suppliers. Among them, only Oman and Kuwait share Jordan's duty-free access under GAFTA.

Despite preferential access through the US-Jordan FTA, Jordan accounts for just 0.03% of processed food imports in the United States. Leading suppliers include NAFTA partners Canada and Mexico, and the European Union, followed by Indonesia, China, Singapore, Thailand, and Brazil. While Singapore also benefits from zero tariffs under its FTA, other major suppliers face tariffs ranging from 1.8% to 5.9%.

Similarly, Jordan represents 0.03% of processed food imports in the European Union. Over 75% of processed food imports come from within the bloc, which benefits from zero tariffs, as does the United Kingdom. Meanwhile, other key suppliers—including China, Brazil, and Malaysia—face an average 15.5% tariff.

An analysis of effectively applied tariffs shows that Jordan's products enjoy substantial tariff advantages – meaning they face lower tariffs compared to the average tariffs faced by competing exporters (Figure 9). When weighted by trade values, Jordan's processed food products enter Saudi Arabia and the United Arab Emirates duty-free while competing exporters face tariffs that are on average 3.4 percentage points higher. Similarly, Jordan's weighted tariff advantage is 2.6 percentage points in Qatar, 0.5 percentage points in the State of Palestine, 1.1 percentage points in the European Union, and 3 percentage points in the United States. These tariff advantages provide Jordan with a competitive edge, even if its market shares remain relatively small.

Figure 9 Tariff (dis)advantage in main markets



Note: the tariff advantage is the difference between the average tariff faced by the rest of the world and the tariff faced by Jordan, weighted by Jordan's exports. The observation for Tunisia (32 percentage points advantage) is not included in the chart.

Source: ITC Trade Map (2025).



CHAPTER 3

Jordan's export potential in processed foods

CHAPTER 3

JORDAN'S EXPORT POTENTIAL IN PROCESSED FOODS

Key markets for potential export growth: MENA and beyond

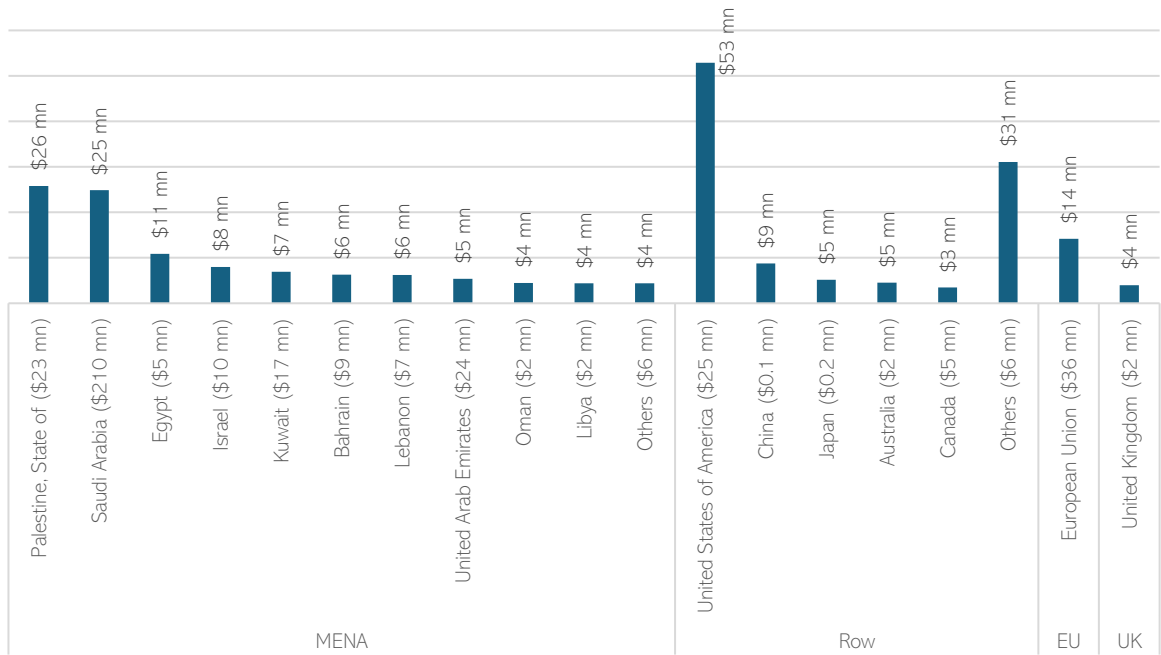
Following the methodology outlined in Figure 2, estimates indicate that the export potential of Jordan in processed food reaches \$422 million, with more than half of this potential currently unrealized, suggesting that Jordan's exports of processed food could increase by up to \$232 million by 2029.

Opportunities for export growth in the sector span both regional and international markets, with particularly strong growth prospects in the MENA region (Figure 10). While Saudi Arabia is undoubtedly the main partner in the region, much of the export potential to that country has already been realized. Currently, Jordan exports over \$200 million in processed food to Saudi Arabia, with an additional unrealized potential of \$25 million. Similarly, the export potential to Jordan's second-largest market in the region, the United Arab Emirates, has also largely been realized, with \$24 million in current exports and \$5 million in unrealized export potential.

In contrast, several underexploited regional markets present significant growth opportunities. For instance, exports to Egypt currently stand at \$5 million, with the potential to increase by an additional \$11 million by 2029. Other such promising markets include, for example, Lebanon, Oman, and Libya.

Note that the highest untapped export potential in the region is identified in the State of Palestine. However, these estimates are based on trade data from 2019 to 2023; therefore, recent conflict-related disruptions are only partially reflected. The resulting \$41 million export potential represents what could be achieved if trade dynamics returned to pre-conflict trends by 2029.

Figure 10 Unrealized export potential in processed food, by market



Note: Figures in parentheses show the 2019-2023 average exports, figures in the chart indicate the unrealized export potential.

Source: ITC Export Potential Map (2025).

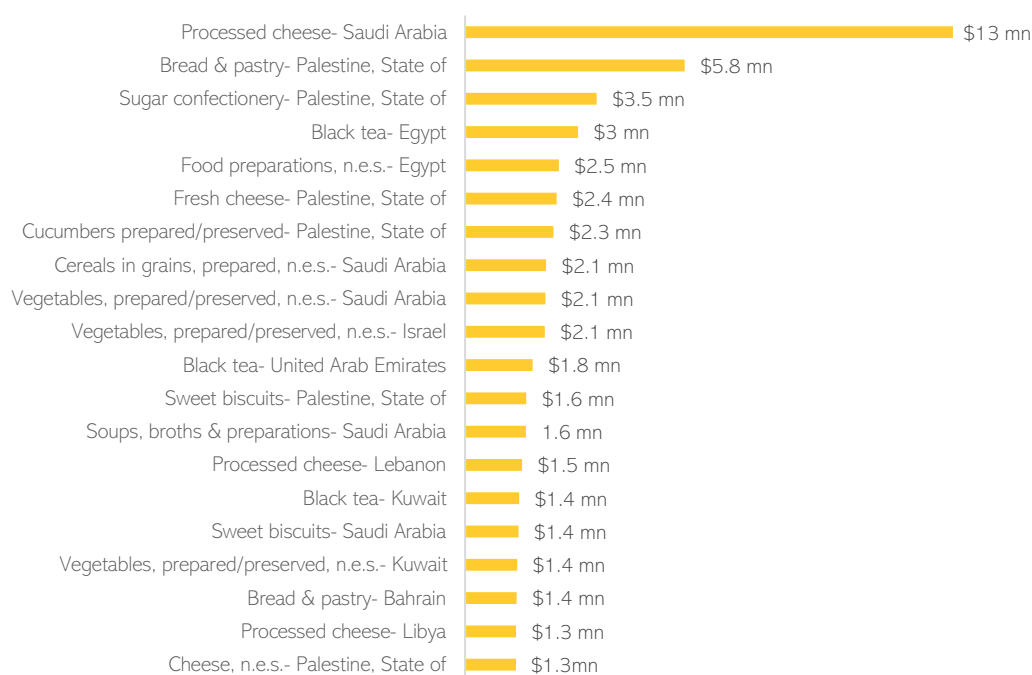
Beyond the MENA region, substantial export growth opportunities exist in global markets. The United States presents the highest unrealized export potential at \$53 million. Other key markets with growth potential include the European Union (\$14 million), Australia (\$5 million), the United Kingdom (\$4 million), and Canada (\$3 million). Additionally, some largely unexplored markets, in particular China (\$9 million) and Japan (\$5 million), also offer opportunities for expansion.

Opportunities in MENA

The MENA region presents \$108 million in unrealized export potential across various product categories. Seven key product categories represent 60% of Jordan's unrealized export potential in MENA: processed cheese, black tea, bread and pastry, sugar confectionery, prepared or preserved vegetables, chocolate and cocoa preparations over 2kg, and sweet biscuits.⁹

The product-market combinations displayed in Figure 11 represent half of the \$108 million potential. For instance, while processed cheese exports are already significant (\$12 million) to Saudi Arabia, an additional \$13 million in unrealized export potential can be tapped into by 2029, marking the country's continuing importance. Other crucial opportunities include exporting bread and pastry to the State of Palestine (\$5.8 million), sugar confectionery to the State of Palestine (\$3.5 million), black tea to Egypt (\$3 million), and other key opportunities.

Figure 11 Unrealized export potential in MENA by product and market



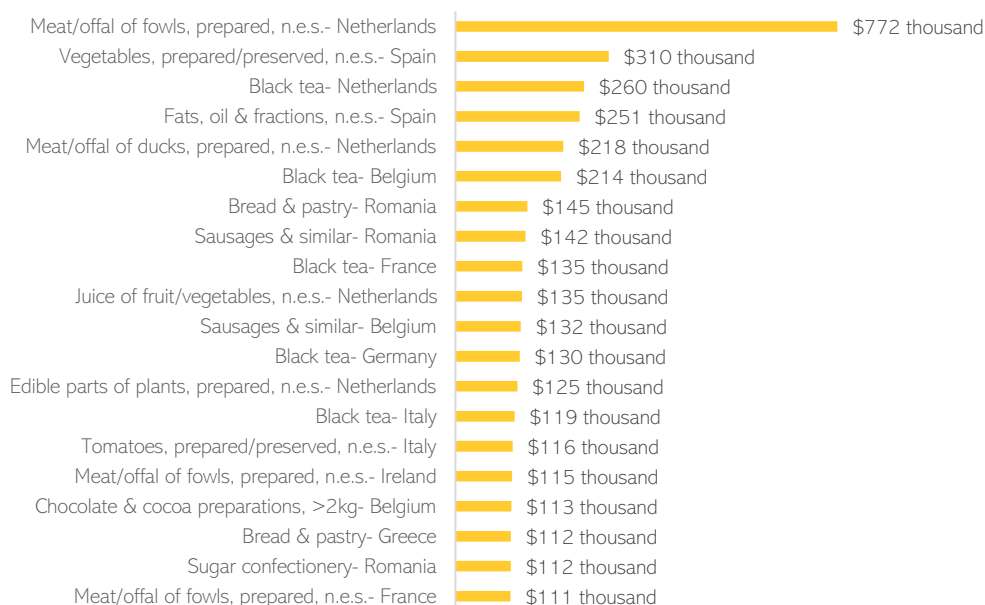
Note: The observations in the chart are the product-market combinations with the most untapped export potential in MENA. They represent half of Jordan's unrealized export potential in the region (\$52 million). The abbreviation "n.e.s." stands for not elsewhere specified.

Source: ITC Export Potential Map (2025).

Opportunities in the European Union

The EU market offers \$14 million in unrealized export potential. The Netherlands, Jordan's primary EU market, presents opportunities in meat or offal of fowls, prepared or preserved, n.e.s. (\$772 thousand unrealized export potential), black tea (\$260 thousand), meat or offal of ducks, and prepared or preserved, n.e.s. (\$218 thousand), among others. Additional opportunities exist in Spain for vegetables, prepared or preserved (\$310 thousand) and fats, oil, and fraction (\$251 thousand), and in Belgium for black tea (\$214 thousand). These opportunities, shown in Figure 12, represent one-third (\$3.8 million) of Jordan's total unrealized export potential in the EU market.

⁹ An alternative view to Figure 11, detailing the markets with the largest unrealized potential is presented in Figure A. 1.

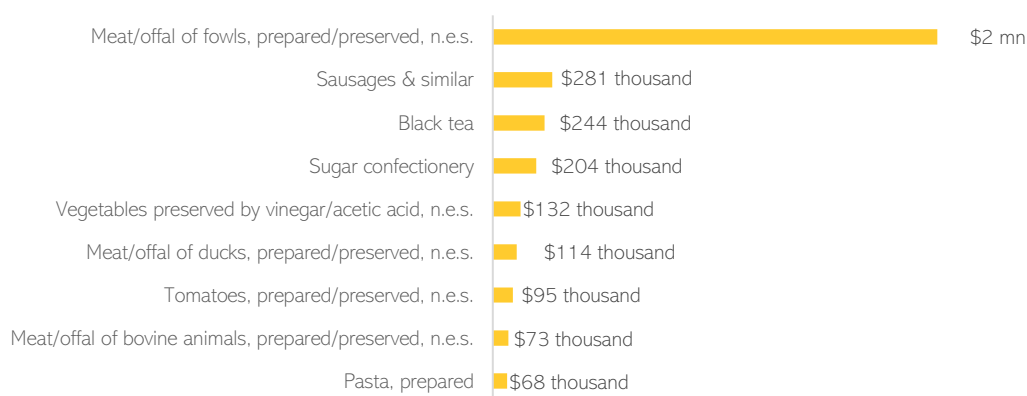
Figure 12 Unrealized export potential in the EU by product and market

Note: The observations in the chart are the product-market combinations with the most untapped export potential in the European Union. They represent one-third of Jordan's unrealized export potential in the region (\$3.8 million). The abbreviation "n.e.s." stands for not elsewhere specified.

Source: ITC Export Potential Map (2025)

Opportunities in the United Kingdom

The product-market combinations displayed in Figure 13 represent 83% of Jordan's unrealized export potential in the UK. Jordan can tap into opportunities in the UK market by increasing exports of meat/offal of fowls, prepared/preserved, n.e.s. (\$2 million in unrealized export potential), sausages & similar (\$281), black tea, packings (\$244 thousand), and sugar confectionery (\$204 thousand), among others.

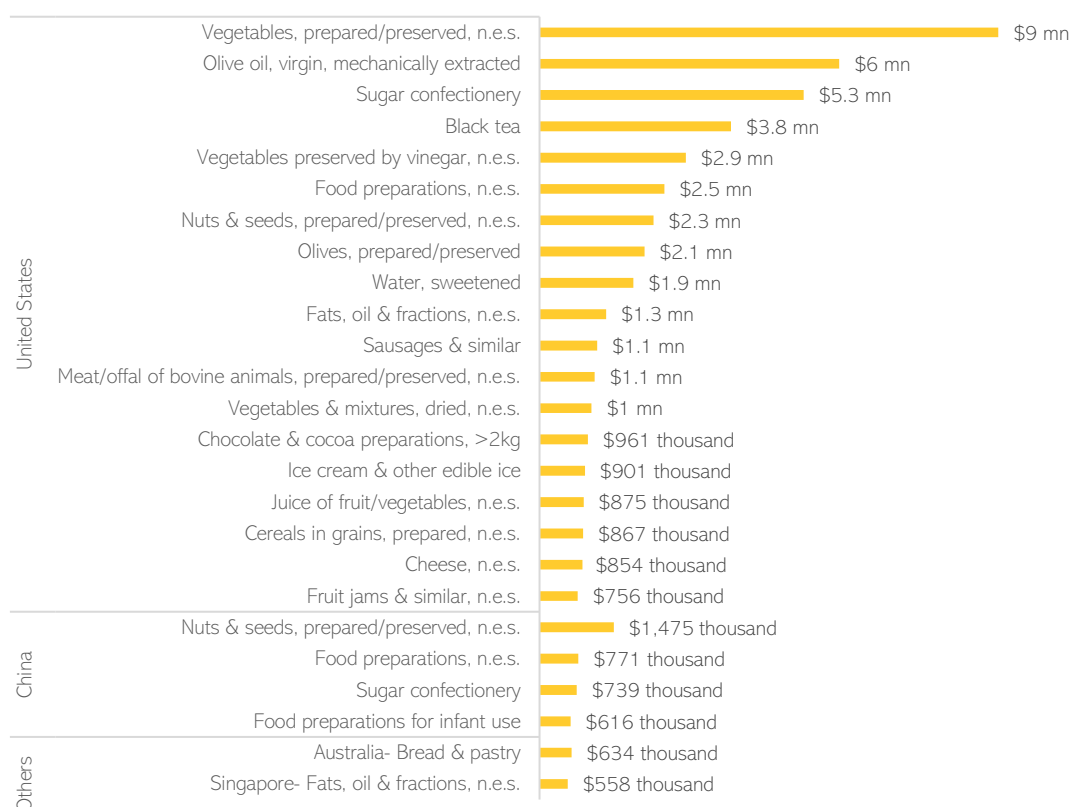
Figure 13 Unrealized export potential in the UK by product

Note: The observations in the chart are the product-market combinations with the most untapped export potential in the United Kingdom. They represent 83% of Jordan's unrealized export potential in the region (\$3.3 million). The abbreviation "n.e.s." stands for not elsewhere specified.

Source: ITC Export Potential Map (2025).

Opportunities in the rest of the world

The product-market combinations displayed in Figure 14 represent half of Jordan's unrealized export potential in the rest of the world, i.e., countries except in the MENA region and the EU or UK. Jordan can tap into opportunities in the United States by increasing exports of prepared or preserved vegetables (\$9 million in unrealized export potential), virgin olive oil (\$6 million), sugar confectionery (\$5.3 million), and black tea (\$3.8 million), among others.

Figure 14 Unrealized export potential in the rest of the world, by product and market

Note: The observations in the chart are the product-market combinations with the most untapped export potential in each partner. They represent almost half (\$51 million) of Jordan's unrealized export potential in the rest of the world, i.e., countries outside of the European Union, the United Kingdom or the MENA region. The abbreviation "n.e.s." stands for not elsewhere specified.

Source: ITC Export Potential Map (2025)

While the findings in this chapter highlight Jordan's export potential for processed foods using a structured economic model that accounts for commonly recognized trade determinants, the reality on the ground presents additional challenges that cannot be overlooked. For example, during ITC's workshops held in Jordan in January and February 2025, industry representatives emphasized the difficulty of meeting traceability requirements for meat and processed meat products. Despite the strong export potential identified in the model for these products, stakeholders widely agreed that realizing these opportunities remains therefore unrealistic without significant investments and long-term structural changes. This discrepancy underscores the importance of supplementing the quantitative results of the trade potential analysis with insights on regulatory and procedural barriers. To provide that comprehensive perspective on market access challenges, the next chapter delves into non-tariff measures (NTMs) and procedural obstacles that hinder Jordanian processed food exports to key markets.



CHAPTER 4

NTMs and market access

CHAPTER 4

NTMS AND MARKET ACCES

Understanding market access challenges for Jordanian processed food exports requires a focused analysis of NTMs and their implications. ITC conducted a large-scale business survey from November 2023 to April 2024, including firms from multiple sectors, among them processed foods.¹⁰ A two-step methodology was employed, beginning with initial telephone screenings followed by in-depth face-to-face interviews for companies reporting difficulties with NTMs. Following the standard NTM nomenclature, the survey categorizes NTMs into sixteen chapters, grouped into technical and non-technical measures, each of them with detailed sub-categories. In addition, to provide a richer picture of the problems companies face, the survey looks beyond regulatory obstacles into at procedural obstacles (POs), i.e., practical challenges directly related to the implementation of NTMs. This classification enables the identification of key compliance-related and procedural challenges that Jordanian processed food exporters encounter in different markets.

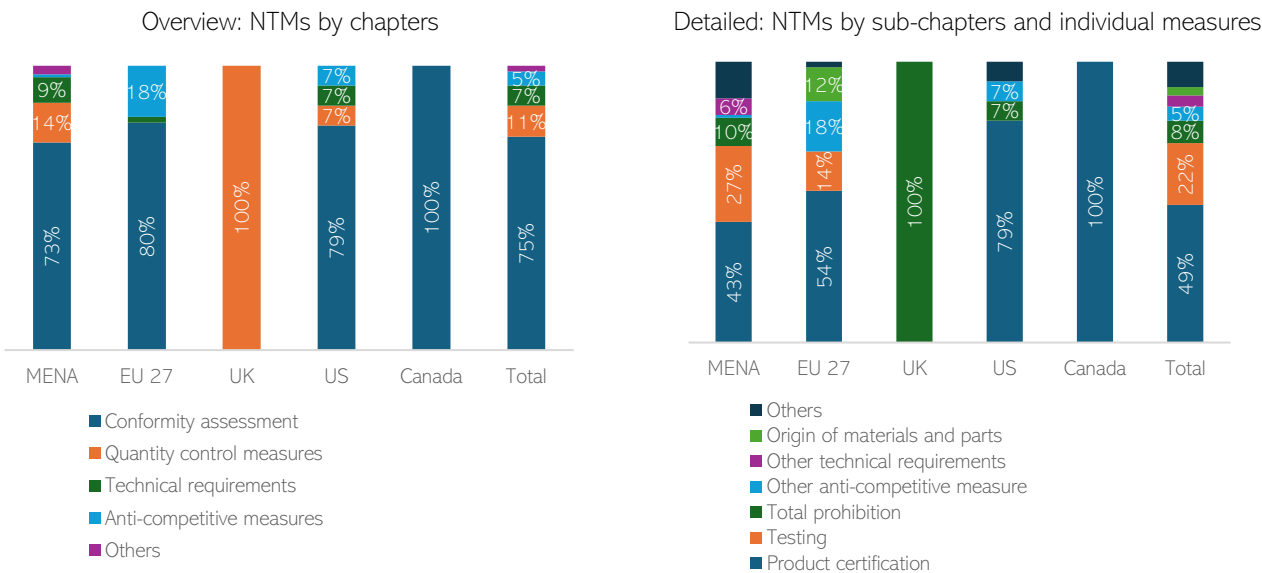
High incidence of NTMs

The survey results indicate that a significant portion of Jordanian processed food exporters face restrictive regulations, with the incidence rate of NTMs reaching 80%. This figure is substantially higher than both the developing country average of 55% and the MENA region average of 58%, underscoring that significant trade barriers hinder the competitiveness of Jordanian processed food exports. Across various export markets, 237 specific cases of NTM-related challenges were reported. Notably, the United States accounted for 14 cases, while the United Kingdom presented a single case.

The most frequent NTM: conformity assessment

The most prevalent NTMs imposed by partner countries are related to conformity assessment measures, which account for 75% of reported challenges (Figure 15, left). Quantity control measures represent another 11%, indicating that compliance with external regulations remains a barrier for Jordanian exporters. Breaking down these measures further reveals that product certification requirements constitute 49% of cases, testing requirements comprise 22%, and total prohibitions represent 8% of the documented challenges (Figure 15, right).

Figure 15 Types of NTMs faced when exporting processed food, by partner region



Source: ITC Business Surveys (2024).

¹⁰ Note that the definition of "processed food" in the ITC NTM Business Surveys differs slightly from the one followed in the rest of the Brief which is based on Trade Map (2025) and Export Potential Map (2025).

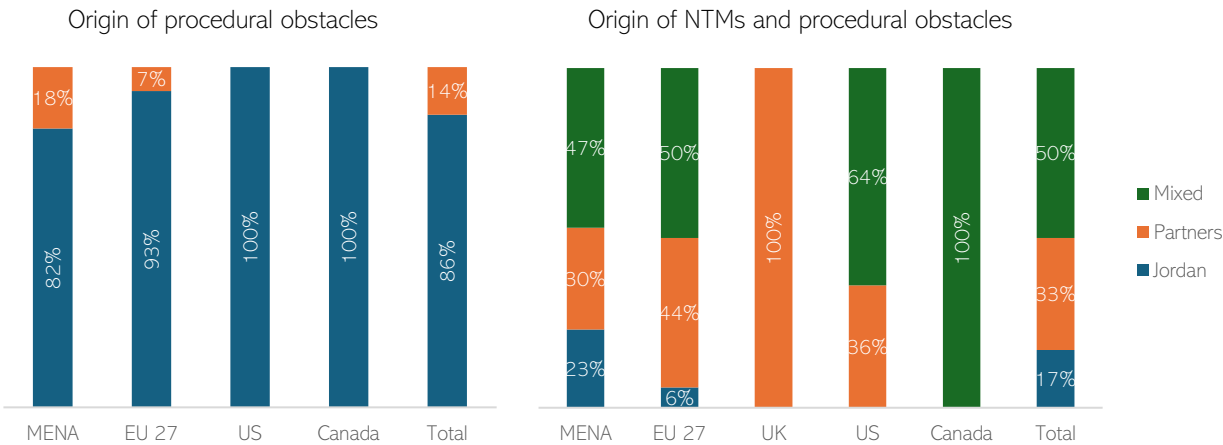
A regional breakdown of these NTMs reveals significant variations. Product certification requirements play a dominant role in Canada (100%), the United States (79%), and the EU (54%)—somewhat less so in MENA (43%). This reflects the stringent food safety and quality standards required to access these markets. In contrast, the United Kingdom presents challenges related to total prohibition. The MENA region imposes a relatively high proportion of NTMs related to testing requirements, which account for 22% of reported barriers. Other prominent NTMs in the EU include anti-competitive measures (28%), testing (14%), and origin and materials of parts (12%).

Challenges originate abroad, but could be addressed locally

An overwhelming 99% of NTMs encountered by Jordanian processed food exporters originate in partner countries, reflecting the necessity for exporters to comply with external standards, often requiring additional resources and adaptation to varying regulatory environments. However, while NTMs originate externally, their impact or reach is compounded by procedural obstacles that oftentimes arise within Jordan itself. This means that exporters not only face regulatory hurdles imposed by their trade partners, but they also struggle with domestic inefficiencies or insufficiencies that hinder their ability to comply with such regulations effectively.

The survey data reveals that when NTMs are partner-imposed, 86% of procedural obstacles occur within Jordan (Figure 16, left). Moreover, a richer picture emerges when both NTMs and POs are considered (Figure 16, right): half of the challenges are a mix of domestic and partner-related issues, partners are the sole source of a third, and 17% of issues originate entirely in Jordan. Compared with exports to other partners, Jordanian exporters of processed food to the MENA region face a higher percentage (23%) of issues that can be fully addressed within Jordan.

Figure 16 Source of the challenges faced when exporting processed food

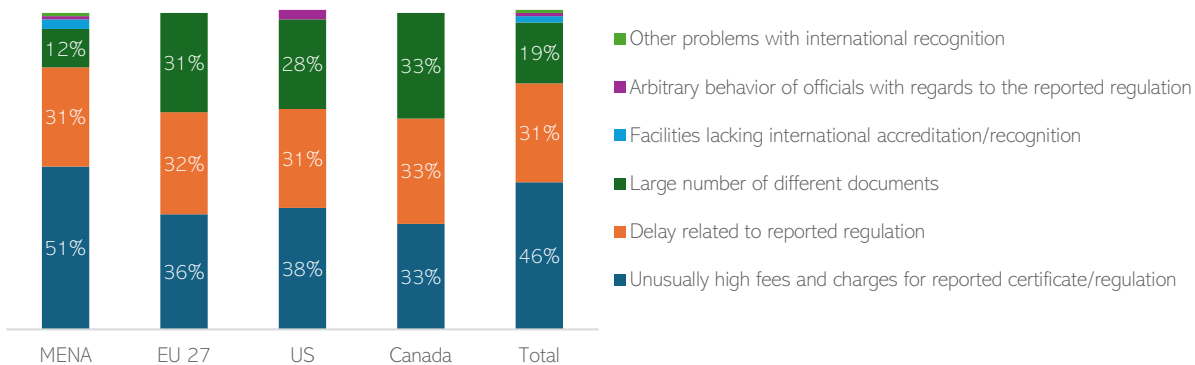


Source: ITC Business Surveys (2024).

Fees, delays and an abundance of documents: the most frequent procedural obstacles

The survey results highlight the various procedural obstacles exporters face within Jordan that significantly hinder their ability to comply with external market regulations. Unusually high fees and charges affect 46% of cases. This issue is particularly pronounced for exports to the MENA region (51%), suggesting that exports to regional markets are often hindered by opaque fee structures and unofficial financial demands, complicating market access. Time constraints constitute another significant challenge, affecting 31% of exporters—across all markets. Administrative burdens also weigh heavily on exporters, with excessive documentation requirements and inefficient approval processes contributing to 19% of reported difficulties. This issue is particularly prominent when exporting to highly regulated markets, such as the European Union and the United States.

Figure 17 Types of domestic procedural obstacles, by partner region



Source: ITC Business Surveys (2024).

Implications and path forward

The findings of this survey point toward the necessity of a dual-track approach to improving market access for Jordanian processed food exports. Domestically, efforts should be directed at reducing informal payments, accelerating regulatory approval processes, and strengthening domestic quality infrastructure. By improving certification and testing facilities to align with international standards, Jordan can reduce its reliance on external compliance measures, thereby lowering trade costs and enhancing efficiency. On an international level, engaging in dialogue with major trade partners, including the European Union, the United States, and MENA countries, could facilitate the harmonization of food safety and quality standards. Capacity-building initiatives aimed at equipping exporters with the necessary resources to meet conformity assessment requirements would further ease the burden of regulatory compliance. Additionally, leveraging regional trade agreements to negotiate more favourable conditions for processed food exports could help alleviate some of the trade restrictions imposed by partner countries.



CHAPTER 5

Conclusions

CHAPTER 5

CONCLUSIONS

The analysis of Jordan's processed food sector and its export potential highlights both its strengths and challenges. The sector has shown consistent growth, outperforming the country's overall export expansion rate. Despite this progress, Jordan's processed food exports remain concentrated in the MENA region, with Saudi Arabia, the State of Palestine, and the United Arab Emirates among the top destinations. This geographic concentration brings both opportunities and risks, as regional political and economic fluctuations could impact trade flows.

The study has identified a significant unrealized export potential for Jordanian processed food products, estimated at \$232 million by 2029. This potential is distributed across multiple markets, with the MENA region leading the opportunities, followed by the United States, the European Union, and emerging markets in Asia. Within MENA, countries such as Egypt, Lebanon, and Libya present underutilized prospects, particularly for products like processed cheese, black tea, and confectionery. Similarly, the European Union and the United States offer room for expansion, especially in niche food segments such as preserved vegetables, sugar confectionery, and olive oil.

Trade agreements such as GAFTA, the Jordan-EU Association Agreement, and the US-Jordan Free Trade Agreement provide Jordanian exporters with preferential access to key markets. While tariffs may not be a significant barrier, other factors—such as competition from global suppliers and particularly NTMs—play a crucial role in limiting Jordan's processed food exports.

NTMs remain one of the most pressing challenges facing Jordanian exporters. An ITC survey revealed that 80% of processed food exporters experience difficulties with restrictive regulations, a rate significantly higher than the developing country average. Conformity assessments, including certification requirements and testing procedures, are among the most common barriers, particularly in the United States, the European Union, and some MENA countries. These barriers not only increase costs but also prolong the time needed to access markets, reducing the competitiveness of Jordanian exporters.

Beyond externally imposed NTMs, domestic procedural obstacles also hinder Jordan's processed food exports. High certification fees, administrative inefficiencies, and time constraints create additional burdens for businesses. These challenges highlight the need for improvements in domestic regulatory frameworks, streamlined certification processes, and enhanced testing facilities that align with international standards.

Given these findings, unlocking Jordan's export potential in processed food requires a multi-faceted strategy. Strengthening domestic infrastructure, particularly in certification and quality control, can help businesses meet the stringent standards of international markets. Targeted capacity-building initiatives can assist SMEs in navigating complex regulatory environments, while enhanced branding and marketing efforts can improve product positioning in foreign markets.

On the policy level, Jordan must leverage its existing trade agreements more effectively while pursuing negotiations to address non-tariff barriers. Increased engagement with major trade partners, particularly in regulatory harmonization efforts, could facilitate smoother market access. Additionally, fostering deeper economic ties with non-traditional markets, including China and Japan, could provide Jordan with new avenues for diversification.

The road ahead for Jordan's processed food exports is marked by both opportunities and challenges. While the sector has demonstrated resilience and strong growth, further expansion will require strategic interventions to overcome market access barriers and enhance competitiveness. By addressing both domestic and international constraints, Jordan can materialize its unrealized export potential and strengthen its position as a player in the global processed food industry.



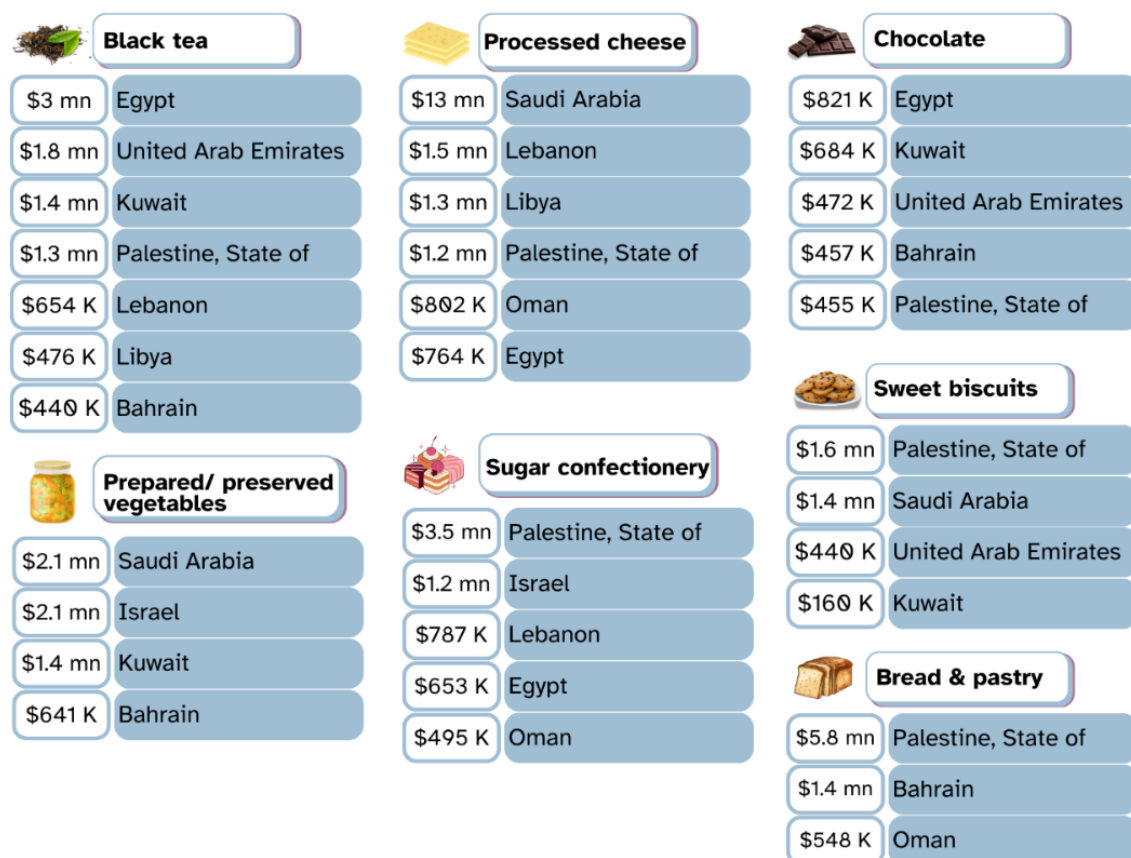
The background of the page is an abstract composition. The top half features a light teal background with a series of thin, white, curved lines that create a sense of depth and movement. A bright, white, circular light source is positioned in the upper left, casting a soft glow. The bottom half of the page is a solid dark blue. The word "ANNEX" is written in a white, serif font, centered horizontally in this dark blue section. The bottom half of the page also features the same abstract teal and white wavy line pattern as the top half, with a bright light source in the lower right, creating a symmetrical effect across the page.

ANNEX

ANNEX

Figure A. 1 displays MENA markets with the largest unrealized export potential for each of the seven key processed food products. The values indicated in the figure account for half of Jordan's unrealized export potential in processed food products in MENA region. Market opportunities vary by product. For instance, for processed cheese, Saudi Arabia serves as the most promising market in MENA with \$13 million in unrealised export potential, followed by Lebanon (\$1.5 million), Libya (\$1.3 million), the State of Palestine (\$1.2 million), Oman (\$802 thousand), and Egypt (\$764 thousand).

Figure A. 1 Unrealized export potential by product and MENA market



Note: Values displayed in the chart represent half of Jordan's unrealized export potential in processed food exports to MENA. The unit abbreviations mn and K correspond to million and thousand.

Source: ITC Export Potential Map (2024).