

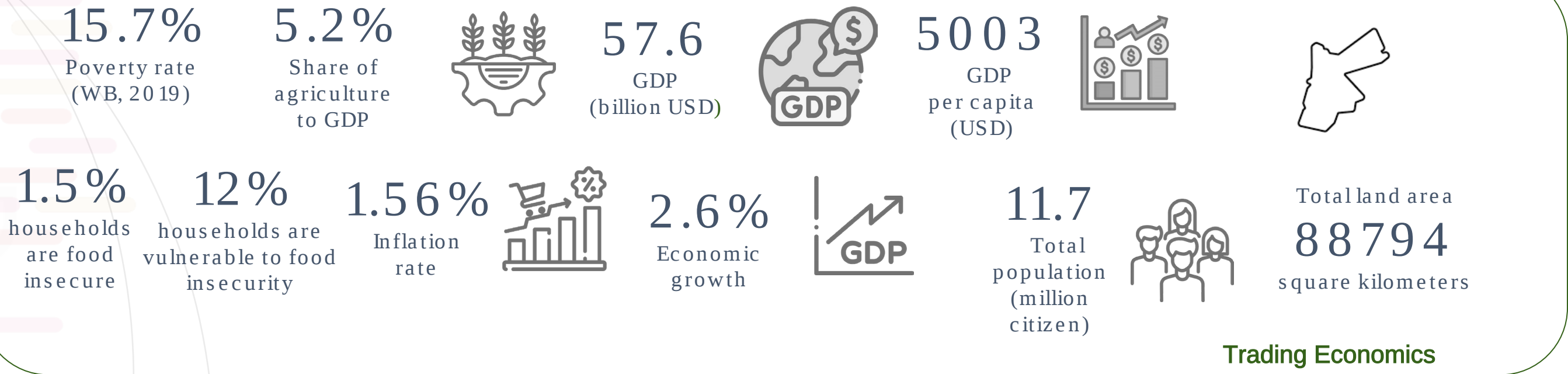
JORDAN

Hand-in-Hand Investment Forum

Rome | 13 to 16 October 2026



General overview



Overview of agricultural sector

- **Diverse climate advantage:**
Jordan enjoys four distinct seasons – an important advantage that enables a wide range of crops and extended growing cycles throughout the year
- **Steady growth in 2024:**
Sector growth of 6.65%, 8.1% in the first quarter of 2025, with a total value added of \$ 3 billion, and a contribution to GDP of 5.2%.
- **Accelerated technological transformation:**
The adoption of automation and modern agricultural techniques increases efficiency and reduces costs, enabling to meet global demand with high quality.
- **Competitive food security ranking:**
Jordan ranks 47th globally on the Global Food Security Index (2022) and continues to advance under the Economic Modernization Vision
- **Strong contribution to exports:**
Agricultural exports worth \$ 1.54 billion, representing 17.4% of total exports, a growth of 39.6% in 2024.

The Economic Modernization Vision 2023 - 2033

National Food Security Strategy 2021 – 2030

National Strategy for Agricultural Development
2020 – 2025

National Plan for Sustainable Agriculture 2022 – 2025

Jordan National Water Strategy 2023 - 2040

Green Growth National Action Plan 2021 – 2025

National Pathway for Food systems Transformation



Jordan 's Agriculture Sector National Policy and Strategic Importance

Alignment with Country Strategic Objectives:

1. Improving the agribusiness environment
2. Enhancing food security and climate adaptation
3. Protection of biodiversity and ecosystems
4. Development of agro-industries based on local inputs
5. Supporting investment, innovation, and technologies
6. Improving the quality of life in rural communities

- **Cornerstone of national economic development**

The sector continues to demonstrate resilience and growth. Approximately 27% of its production is export-oriented, showcasing its competitiveness in regional and international markets. 52% of input materials are sourced locally, significantly enhancing food security and reducing dependence on imports

- **Efficiency despite limited resources:**

Despite water scarcity (1 billion m³ per year), the sector consumes 584 million m³ and produces 2.7 million tons of plants, meeting 61% of food needs.

Why invest in Jordan



- **Strategic Location:** Jordan is close to markets with high demand, enhancing **the competitiveness of agricultural exports**.
- **Political and Macroeconomic Stability:** One of the region's most stable investment environments; continuous engagement with IFIs including World Bank and IMF. Constitutional monarchy, rule of law, strong bilateral and multilateral partnerships.
- **Innovation in sustainable farming:** the Agricultural Research Center has made major strides in sustainable farming – establishing a National Seed Bank, improving crop varieties and advancing aquaponics, hydroponics, and climate-resilient wheat and barley.
- **Advanced food safety control:** Strong national legislation, accredited research centers and laboratories that support **the safety and quality of food products**.
- **Skilled and competitive workforce:** Jordan is characterized by **a young and qualified human resources**, with a **literacy rate of 96%**, and a constantly updated vocational training system.
- **Legislative framework supporting food security:** Adopting **a national strategy for food security** with high political support, reflecting the national commitment to the advancement of the sector, and establishing the Higher Council for Food Security, chaired by the prime Minister.
- **Credit Services:** The Agricultural Credit Corporation (ACC) financed more than 12,880 farmers and investors in 2025, (33% Women), with a lending growth of 12% in 2025, and an expected 9% growth in 2026.

Why invest in Jordan



1. The existence of development zones and free zones enjoying customs and tax exemptions

2. The modern investment environment law provides strong incentives for investors in the agricultural sector:

✓ **Exemptions:**

- Exemption from **customs duties and sales tax** on fixed assets.

✓ **Tax facilities:**

- Includes reductions on income tax and social services tax.
- Manufacturing Industry In Development Zones has 5% tax instead of 14%.
- Other Sectors In Development Zones have 10% tax instead of standard 20%
- Support for operational processes and the establishment of **various development zones**.

✓ **Guarantees and protection for investors:**

- **Equality of the foreign investor** with the Jordanian investor: ownership, management, transfer of profits, and liquidation.
- **The right to manage the project** and the freedom of people to choose this management
- **The right to take out the foreign capital** that he brought into the Kingdom to invest in it and the investment he earned
- **Freedom to transfer** the salaries and compensation of technicians and administrators outside the Kingdom.
- **Property protection:** No expropriation except for the public benefit with **fair and transferable compensation**.
- **Dispute settlement mechanisms:** amicable settlement within 6 months, then the possibility of resorting to the judiciary or to the **International Center for Settlement of Investment Disputes (ICSID)** - Jordan has been a member since 1972.
- **Flexibility in re-exporting or converting assets:** the possibility of re-exporting, selling, or assigning exempted fixed assets.

Hand - in - Hand Priority Investment Locations

- **Deir Alla/ Balqa**
- **Northern Jordan Valley**
- **Mafrqa**

Targeted Agrifood System Network and Services

Aggregation and Cold Chain

- Sorting, grading, cooling, packing, and traceability for fresh produce

Processing and Value Addition

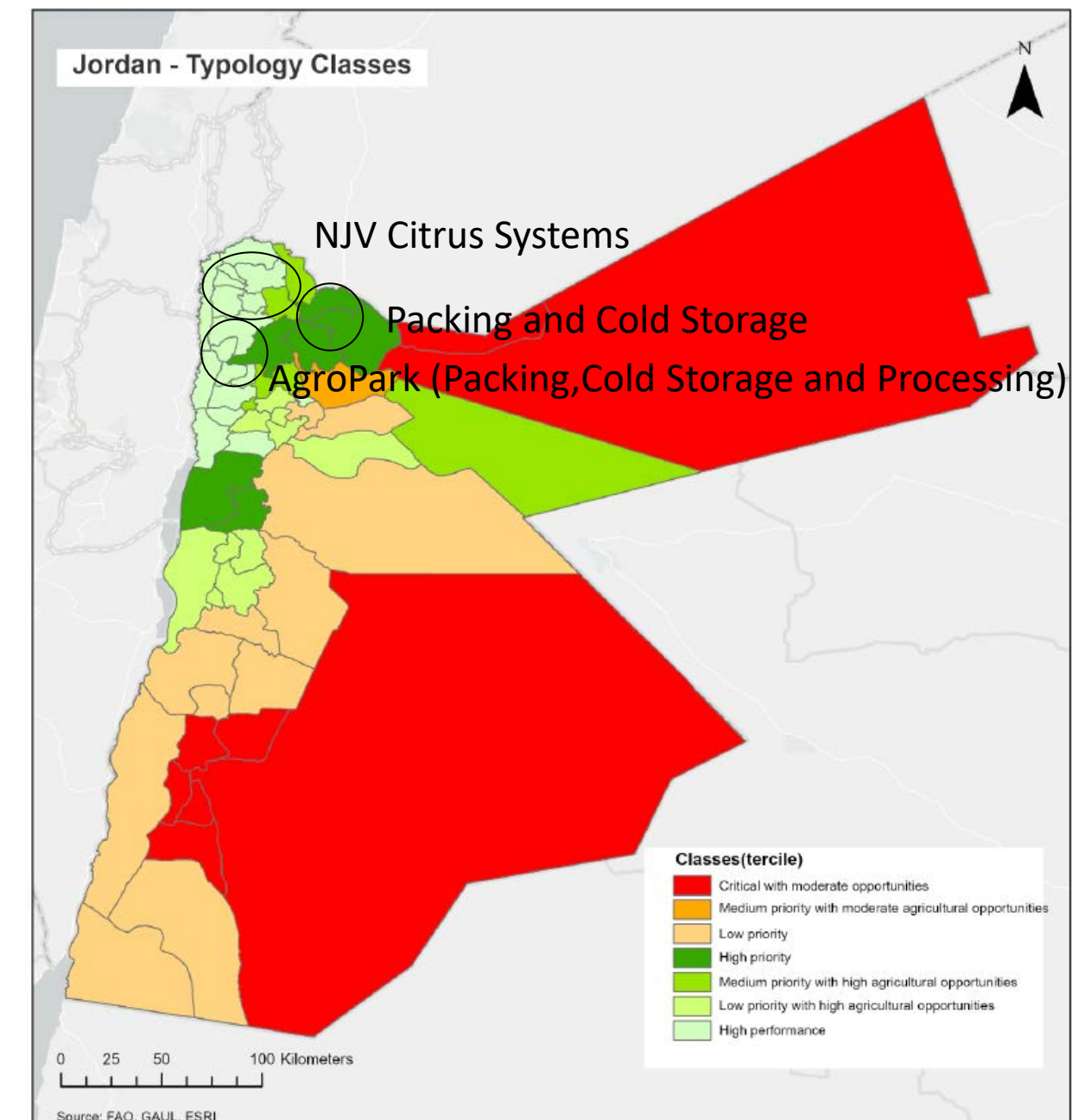
- Tomato paste, juice concentrates, IQF and broader horticulture product lines

Climate Smart Production

- Water, soil, and pest management for resilient smallholder and commercial production

Rural Alliance and Market Linkages

- Organized producer groups with formal supply contracts to processors and aggregators



Source: Stochastic frontier analysis FAO-HiH task force (2025)

- Aligns with Government Priority areas for agriculture production
- Government priority focus combined with the agricultural typologies

Priority Investments identified

Fruits and vegetables



01

Deir Alla Agropark- Horticulture Packing and Processing

Jordan — Deir Alla

Deir Alla District highlighted in the central Jordan Valley

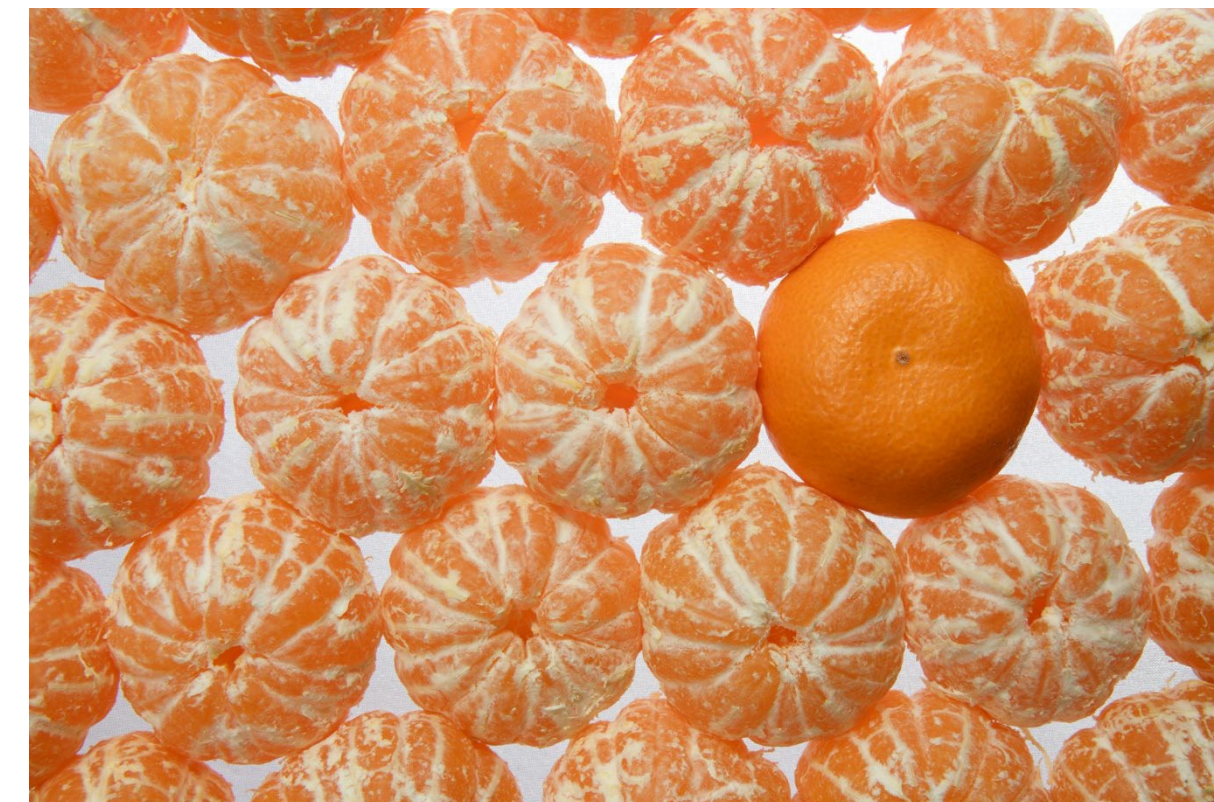
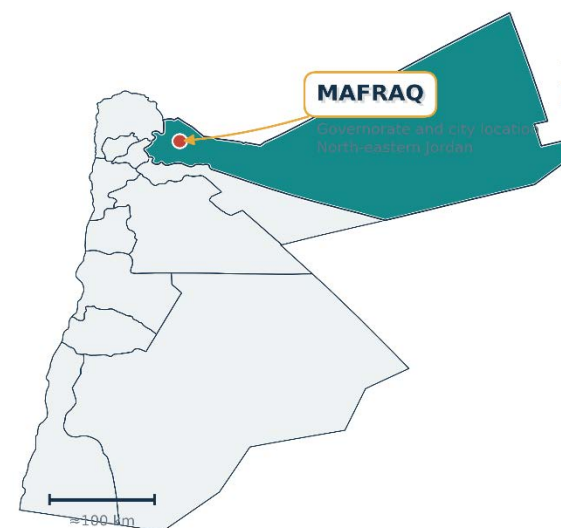


02

Mafraq Stone Fruit Hub- Sorting and Packing

Jordan — Mafraq Governorate

Mafraq highlighted within Jordan's 12 governorates

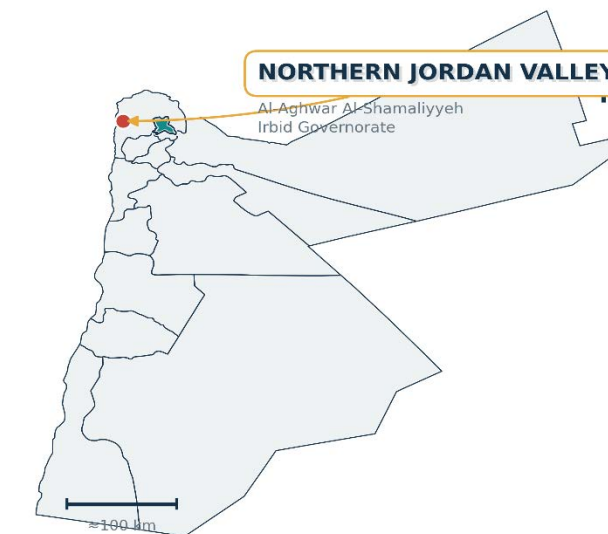


03

Northern Jordan Valley Citrus

Jordan — Northern Jordan Valley

Al-Aghwar Al-Shamaliyyeh District highlighted in north-western Jordan



Deir Alla Agropark: Market Demand.



A. Export Market

Current export momentum:

Jordan exported approximately **197,000 tons of vegetables during Jan–Jun 2026**, compared with **174,000 tons** in the same period of 2025—a **13.1% increase**.

Tomatoes are the anchor vegetable export:

In 2024, Jordan reported exporting **226,157 tons of fresh tomatoes**, valued at **US\$125.33 million**, averaging **US\$0.55/kg**.

Main destinations were Saudi Arabia, Kuwait, Oman, Bahrain, UAE, Qatar and Iraq.

Gulf Cooperation Council markets purchased approximately **203,600 tons** of Jordanian tomatoes: Approximately **90% of Jordan’s tomato export volume**

Saudi Arabia alone absorbed about **45%** of total tomato exports

Other exportable Deir Alla products: cucumbers, squash, eggplants, sweet and hot peppers, string beans, lettuce, carrots, okra, onions and herbs.

Tomatoes remained Deir Alla’s largest vegetable crop: 122,330 tons, Approximately 29% of total vegetable production

Tomatoes, cucumbers, potatoes and sweet peppers together produced approximately 300,947 tons: More than 71% of Deir Alla’s vegetable production

Competitive advantage:

Early winter production, proximity to regional markets, established Gulf trade and the capacity to produce when temperatures are lower elsewhere in Jordan.

Processed Tomatoes exports, 2025

Jordan’s exports of processed tomato products was 6,209.5 tonnes in 202, a 98.4% increase

Combined processed-tomato export value increased from JOD3.33 million in 2024

To JOD6.54 million in 2025, a 96.5% increase.

Jordan simultaneously imported approximately **18,322 tonnes of processed tomato products in 2025**, valued at **JOD13.43 million**.

B. Market Potential & Growth — National and Export

Future Demand:

There is a big potential for increasing demand for Jordanian horticultural products, due to **increasing demand from the GCC**

The **Jordan–Syria–Türkiye transport memorandum**, signed on **7 April 2026**, could create additional opportunities by:

- Improving refrigerated land transport through Syria and Türkiye
- Reducing transit costs and border delays
- Providing access to Türkiye and potentially European markets
- Connecting Jordan and Gulf markets with Mediterranean transport routes
- Creating alternative routes for time-sensitive agricultural exports

Production base:

The latest data for Deir Alla recorded approximately **8081 hectares of vegetables** across spring and autumn cycles: about **5277 hectares in autumn cycle** and **2804 hectares in the spring cycle**. Combined production was approximately **421,537 tons**.

Main crops by reported production: tomatoes **122,330 tons**; cucumbers **80,676 tons**; potatoes **57,003 tons**; sweet peppers **40,938 tons**; squash **23,591 tons**; onions **21,951 tons**; eggplants **19,873 tons**; lettuce **16,781 tons**; carrots **9,015 tons**; and other vegetables.

Planted area increased by 13.3%

Production increased from 390,092.3 to 421,537.4 tons, a production growth of 8.1%

Indicative existing value:

At an assumed weighted wholesale price of **USD 0.35–0.63/kg**, Deir Alla’s vegetable output represents approximately **USD 153–276 million annually**.

Positive effects from complementary initiatives

- Rural alliance support
- FAO/UNIDO TA on Gulf export compliance (food safety, GAP, traceability)
- Climate-smart agriculture advisory to mitigate groundwater salinity

KEY BOTTLENECKS

- Deir Alla: 24.5% of national vegetable production (tomatoes, cucumbers) — no formal cold chain or processing infrastructure
- Refrigerated storage covers only 5.5% of fresh production in Jordan (139,000 MT vs. 2.4M MT output)
- 30% post-harvest loss nationally; seasonal gluts cause farmgate price collapses
- Water embedded in post-harvest losses generates zero economic return — new water costs over USD 3/m³
- No value-capture pathway for below-grade and surplus produce
- 3,000 organized producers in Deir Alla/Mafraq with no facility to aggregate, grade, store, or process output

KEY INVESTMENTS

Component 1a: Vegetable Cold Storage Center

- FFV post-harvest center: tomatoes, cucumbers, mixed vegetables
- Capacity: 50,000 MT holding capacity
- Includes PV electricity generation

Investment cost: USD 32,865,000 (private/PPP)

Component 1b: Set up a horticulture Processing facility (Co-located with 1a above) to produce

- Tomato paste,
- juice concentrates,
- broader horticulture: cucumbers, potatoes, beans, capsicum
- Establish supply contracts: 24-hr fresh harvest from 3,000 rural alliance producers and vicinity
- Providing specialized support on quality standards USD 276,711

Investment cost: USD 7,900,000 private/PPP

RISKS AND MITIGATION

R -Price volatility of fruits/veg raw materials (1a)

- M -Diversified sourcing (30/70%); sensitivity score 1/6 for investment cost

R –Processed product price volatility

- M –Diversification of end markets: supportive national policies and taxes

R -Raw material consistency (Component 1b)

- M -Co-location with 1a; establish rural alliance contracts with 3,000 horticulture producers

R – Limited quality standards adoption at national level and part of export to the GCC

- M – provide technical support on market quality standards for horticulture products

R - Land allocation for the planned facilities

- M –Jordanian-Palestinian Agricultural Company (JPACO) or municipality land/warehouses/storage are pre-identified

R –(in)Efficient use of resources

M – water use and reuse including circular model, closed-loop in co-located 1a/1b

Below-grade produce from 1a feeds directly into 1b — zero-waste integrated model. Circular Economy

Deir Alla Agropark: Financial Detail



INDICATOR	COMPONENT 1a Cold Storage	COMPONENT 1b Processing	AGROPARK Combined
Investment (USD)	32,865,044	7,900,000	40,765,044
IRR	19 %	34%	19% and 34%
NPV (USD)	11,846,628	8,514,143	11,846,628 and 8,514,143
Direct beneficiaries	1643	395	2038
Indirect beneficiaries	8216	1975	10191
Total beneficiaries	9859	2370	12229
Expected per capita income increase	684	850	716
Ownership model	Private/PPP	Private/PPP	Private/PPP

Mafrq Stone Fruit Hub: Specialized Post-Harvest Center

A. Export Market

Existing national export market — 2025

Jordan exported 85,449 tons of stone fruits in 2025, valued at approximately **JOD146.2 million (US\$206.1 million)**.

Compared with 2024:

Export volume increased by **8.5%**.

Average declared export value declined from **JOD2.39/kg to JOD1.71/kg**.

- Peaches and nectarines remained the dominant export category, accounting for approximately:
 - o 75% of stone-fruit export volume.
 - o 79% of stone-fruit export value.
- Apricots recorded the strongest market expansion, adding approximately 6,378 tons of exports in one year.
- Peaches/nectarines: **64,334 t — US\$163.7 m**
- Apricots: **20,830 t — US\$ 41,364m**
- Main markets: **Saudi Arabia, Iraq, UAE, Kuwait, Oman, Bahrain and Qatar**
- Saudi Arabia absorbed approximately **38,271 t** of Jordanian peaches/nectarines and apricots

Export momentum

- *Jordan's total fruit exports increased from 71,000 t in H1 2025 to 83,000 t in H1 2026, an increase of 18% . This confirms growing regional demand but should not be treated as a permanent annual growth rate.*

National export volume in 2025 was equivalent to about 76% of Mafrq's reported production.

Market position: Mafrq can supply a significant share of Jordan's export growth because its 112,815 t production base is large relative to the 78,805 t national stone-fruit export volume reported in 2024. However, national export data cannot be attributed entirely to Mafrq.

B. Market Potential & Growth — National and Export

Future Demand:

There is a big potential for increasing demand for Jordanian horticultural products, due to **increasing demand from the GCC**

The **Jordan–Syria–Türkiye transport memorandum**, signed on **7 April 2026**, could create additional opportunities by:

- Improving refrigerated land transport through Syria and Türkiye
- Reducing transit costs and border delays
- Providing access to Türkiye and potentially European markets
- Connecting Jordan and Gulf markets with Mediterranean transport routes
- Creating alternative routes for time-sensitive agricultural exports

Production base:

Mafrq's stone-fruit area reached 4,683 hectares in 2025, increasing by approximately 1.0% from 2024.

Total production reached 112,815 tons, increasing by 3.5%.

Mafrq had approximately 2.447 million stone-fruit trees in 2025:

2.127 million bearing trees.

319,818 non-bearing trees.

Non-bearing trees represented approximately 13.1% of the total tree population.

If currently non-bearing trees achieve the average 2025 yield of bearing trees:

Production could reach approximately 129,100 tons annually.

This represents an additional 16,300 tons.

Potential production growth is approximately 14.4% above the 2025 level.

Indicative additional production at full bearing:

Peaches: approximately 8,683 t.

Apricots: approximately 4,700 t.

Nectarines: approximately 2,864 t.

Positive effects from complementary initiatives

- Rural alliance support
- FAO/UNIDO TA on Gulf export compliance (food safety, GAP, traceability)
- Climate-smart agriculture advisory to mitigate groundwater salinity

KEY BOTTLENECKS

- Mafaq: ~40% of Jordan's total FFV production and over **80% of seasonal stone fruit** (peaches, nectarines, apricots)
- No formal aggregation, cold chain, or specialized post-harvest infrastructure at this scale
- Stone fruit is highly perishable; narrow marketing windows, peak harvest price collapses, high losses
- Quality inconsistency limits Gulf export access despite proximity to high-demand GCC markets
- Structural constraints: groundwater salinity and high electricity costs for cold storage⁵
- No formal traceability or food safety infrastructure at production zone level

KEY INVESTMENTS

Mafaq Stone Fruit Post-Harvest Center

- Facility: sorting, grading, scaling, cooling, packing — specialized for stone fruits
- Throughput: 25,000–30,000 MT/year
- Core equipment: selection roller conveyors (delicate fruits), drying tunnels, high-resolution electronic sorters, cold rooms using integrated PV, traceability system
- Product focus: peaches, nectarines, apricots, seasonal produce
- Co-financing: MoA to provide land; seeking private operator with stone fruit experience

Investment cost: USD 5,010,234 (PPP)

RISKS AND MITIGATION

Stone fruit price volatility at peak harvest

- Cold chain enables market timing
- Raw material supply consistency
- Establish contracts through rural alliance ; hybrid sourcing model
- Off grade fruit could feed processing centers

Groundwater salinity affecting production base

- TA on climate-smart agriculture; alignment with World Bank ARDI

High electricity cost for cold storage

- Solar PV integration in facility design (pipeline); National Green Growth Plan alignment

Gulf export compliance

- National export certification mechanism supported by specialized TA;
- Traceability in core equipment

Site availability

- MOA pre-identified site location

Credit access

- SDG Fund blended finance; TA frontloaded

Mafrq Stone Fruit Hub: Financial Detail

INDICATOR	MAFRAQ STONE FRUIT HUB
Investment (USD)	5,010,234
IRR	41.9%
NPV (USD)	8,520,261
Throughput	25–30,000 MT/yr
Total beneficiaries	1000
Ownership model	PPP

Phase 2 option
Off-grade/surplus stone fruit could feed expanded processing at Deir Alla. Contingent on broader logistics and horticulture feasibility.

North Jordan Valley Citrus Hub: Cold Storage facility



A. Export Market

Existing exports: Jordan exported approximately 4,949 tons of citrus fruit in 2024, with a declared export value of about US\$7.17 million:

Lemons and limes: 2,672 tons — US\$3.51 million

Oranges: 1,781 tons — US\$3.06 million

Grapefruit: 272 tons — US\$0.41 million

Mandarins and clementines: 224 tons — US\$0.20 million

Average declared export value across these citrus products: approximately US\$1.45/kg.

The Gulf Cooperation Council countries are the principal export market:

Purchased approximately 4,585 tons

Export value of approximately US\$6.68 million

Represented about 93% of Jordan’s citrus export volume and value

Leading markets by product:

Oranges: Oman, Qatar, Saudi Arabia, Kuwait and Bahrain

Lemons and limes: Saudi Arabia, United Arab Emirates, Kuwait, Bahrain and Qatar

Mandarins and clementines: Qatar, Saudi Arabia, Kuwait and Bahrain

Grapefruit: Saudi Arabia, United Arab Emirates, Qatar, Kuwait and Bahrain

Combined orange and lemon/lime exports reached at least **4,453 tons worth US\$6.57 million.**

Mandarins and other citrus are additional t are not included in this total.

2026 export momentum: Jordan’s total fruit exports increased by **18% in Jan–Jun 2026**, reaching approximately **83,000 tons.**

B. Market Potential & Growth — National and Export

Future Demand:

There is a big potential for increasing demand for Jordanian horticultural products, due to **increasing demand from the GCC**

The **Jordan–Syria–Türkiye transport memorandum**, signed on **7 April 2026**, could create additional opportunities by:

- Improving refrigerated land transport through Syria and Türkiye
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- Connecting Jordan and Gulf markets with Mediterranean transport routes
- Creating alternative routes for time-sensitive agricultural exports

Production base: The latest publicly accessible detailed DOS table for North Shouneh recorded approximately **5,558 hectares of citrus**, including lemons, several orange varieties, clementines, mandarins and pummelos. Production was approximately **109,496 tons.**

North Jordan Valley accounts for about **82% of Jordan’s citrus production**, confirming its strategic importance to national citrus supply.

DOS recorded about **1.87 million citrus trees**, of which approximately **1.61 million were bearing** and **260,000 had not entered production.** The equivalent planted area is estimated at **4,785 bearing hectaress** and **770 non-bearing hectares.**

Existing national market: Approximately **105,000 tons** remain after deducting recorded orange and lemon exports; this is indicative because other citrus exports, imports, losses and stock changes are excluded. At an assumed wholesale value of USD **0.49–0.77/kg**, the domestic market value is approximately **USD 52–81 million.**

Positive effects from complementary initiatives

- Rural alliance support
- FAO/UNIDO TA on Gulf export compliance (food safety, GAP, traceability)
- Climate-smart agriculture advisory to mitigate groundwater salinity

KEY BOTTLENECKS

- Lack of cold storage, especially in NJV
- Jordan produced 154,106 tons of citrus in 2023, a 64% increase since 2014
- Less than 80% of citrus trees are currently fruit-bearing; supply surge not yet complete
- Short season of current citrus production
- Processing sector virtually absent: one commercial processor identified nationally
- Citrus exports fell from 44% of production in 2013 to 2% in 2023
- NJV farms receive ~4,000 m³/ha of surface water annually — half the 8,000 m³/ha crop requirement
- Jordan imports ~37,000 tons of citrus/yr (73% Egypt) domestically producible
- EU export requires sorting, waxing, cold chain, and MRL compliance — standards incompatible with water-stressed **trees**⁷

KEY INVESTMENTS

North Jordan Valley Citrus: Cold Storage Center

- Facility: sorting, grading, scaling, cooling, packing — specialized for Citrus.
- Capacity: 25,000 MT
- Core equipment: selection roller, drying tunnels, high-resolution electronic sorters, cold rooms, traceability system
- Product focus: Citrus, Medjool Dates, Potatoes, Carrots, Onions, Garlic, seasonal produce
- Ownership: private investor/operator (Citrus experience)
- End markets: domestic retail and Gulf export (Saudi Arabia, UAE, Kuwait)
- Includes PV electricity generation

Investment costs: USD 16,610,159 Private

RISKS AND MITIGATION

Citrus price volatility at peak harvest

- Cold chain enables market timing
- Raw material supply consistency
- Rural alliance contracts; hybrid sourcing model
- Off grade fruit could feed processing centers

High electricity cost for cold storage

- Solar PV integration in facility design (pipeline); National Green Growth Plan alignment

Gulf export compliance

- TA embedded in SDG Fund F&V JP; traceability in core equipment

Water inefficiency

- Cold chain reduces post-harvest loss 30–40%, recovering embedded irrigation water

Groundwater salinity affecting production base

- TA on climate-smart agriculture; alignment with World Bank ARDI

Climate change worsening water scarcity

- Solar desalination climate-resilient: independent of surface allocation and grid electricity; 40kW PV ensures continuity under rationing

North Jordan Valley (NJV) Citrus System: Financial Details



INDICATOR	North Jordan Valley Citrus Hub
Investment (USD)	16,610,159
IRR	18.6%
NPV (USD)	5,724,193
Capacity	25,000 MT
Total beneficiaries	4,983
Ownership model	Private Sector

*Mainly for Citrus, in addition to Medjoul Dates, Potato and other seasonal products.
Off-grade/surplus Citrus could feed expanded processing at Deir Alla.*

**62.4 Million
USD**

Investment Cost

34,605,225

Total NPV*

18.6-41.9 %

IRR Range*

18213

Total
Beneficiaries*

3119

Total Direct
Beneficiaries*

15094

Total Indirect
Beneficiaries*

707

Avg per Capita
Income Increase*

Investment Case

**Deir Alla Agropark: Integrated FFV Cold
Storage and Processing Complex**

Investment:

40.8 Million USD

NPV:

11,846,628 and 8,514,143 USD

IRR:

19 % and 34 %

Direct Beneficiaries:

2038

Indirect Beneficiaries:

10191

Total Beneficiaries:

12229

Per Capita Income Increase:

716

Investment Case

**Mafrq Stone Fruit Hub: Specialized Post-
Harvest Center**

Investment:

5 Million USD

NPV:

8.5 Million USD

IRR:

41.9 % *

Direct Beneficiaries:

250

Indirect Beneficiaries:

750

Total Beneficiaries:

1000

Per Capita Income Increase:

735

Investment Case

**NJV Citrus Hub: Specialized Post-
Harvest Center**

Investment:

16.6 Million USD

NPV:

5,724,193

IRR:

18.6 %

Direct Beneficiaries:

831

Indirect Beneficiaries:

4153

Total Beneficiaries:

4983

Per Capita Income Increase:

669