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## **Report Highlights:**

The U.S.-Jordan bilateral food and agricultural products trade in calendar year U.S. food and agricultural product exports to Jordan in calendar year (CY)2022 (January-November) at \$192 million are down 10 percent compared to \$213 million for the same period 2021. Although Jordan has traditionally been price sensitive, Jordanian consumer behavior is changing. Supermarket chains are the main channel for marketing imported food products. These target mainly middle- and upper-income consumers. Younger Jordanians are reportedly engaging in increased aspirational and lifestyle purchases thanks to increased exposure to global trends and brands.

### Market Fact Sheet: Jordan

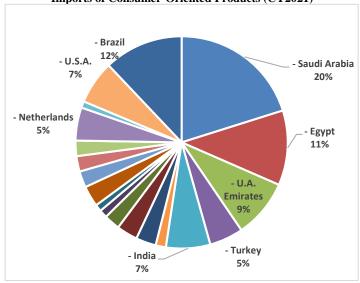
### **Executive Summary**

U.S. food exports to Jordan benefit from a free trade agreement, but face competition from suppliers enjoying greater proximity. U.S. food and agricultural product exports to Jordan in calendar year (CY)2022 (January-November) at \$192 million are down 10 percent compared to \$213 million at same period 2021. Rice, nuts, beef, cheese, and food preparations are the main exports. Consumers are price sensitive given high unemployment (~24 percent) and falling disposable income. Jordan shows resilience in light of the Syrian civil war; however, absorbing 1.3 million refugees is straining the socioeconomic fabric and testing political stability. Financial assistance (mainly from the Gulf countries) meets some refugee costs but not all. The Jordanian dinar (JOD) and the U.S. dollar are pegged at JOD 0.710 to \$1.00.

## **Imports of Consumer-Oriented Products**

Jordan imported \$1.763 billion in consumer-oriented products in 2021.

**Imports of Consumer-Oriented Products (CY2021)** 



### **Retail Food Sector**

Jordan's retail food sector is about \$4.5 billion. High-income consumers drive demand for imported products, while middle- and low-income consumers focus on domestic goods. Consumers in the capital of Amman (especially in affluent West Amman) and in the other major cities are shopping in modern outlets (hypermarkets). Modern retailing is growing in number and volume of sales. Hypermarkets' lower prices and a greater product selection is displacing traditional, independent grocers and retailers. Traditional outlets do still dominate, representing 85 percent of total outlets and 90 percent of total sales. Online and mail order is popular.

### Food Processing vs. Imports in the Retail Sector

There are 4,000 food processors, five percent with turnover of \$704,000 per annum. Larger ones count with export scale, but face competition from imports. Most are in the bakery, food preparations, and dairy products sectors, focusing on processed and packaged foods and beverages. Smaller processors focus on fresh bakery and dairy production. There is growth in prepared consumer food and (sheep) meats for export.

### **Hotels, Restaurants, and Institutions**

Jordan's tourism sector is recovering steadily. Gross-value-added in the sector is reportedly (\$950 million).

### Ouick Facts CY 2021

### **Imports of Consumer-Oriented Products \$1.4 billion**

### List of Top 10 Growth Products in Jordan

Rice
 Frozen Chicken, Cuts
 Nuts
 Fresh Apples
 Cheese
 Beef, Muscle Cuts

7) Food Preparations 8) Honey

9) Fish and fish Products 10) Groats & Meals of Maize

### **Consumer-Oriented Foods (\$ billions) 2021**

Consumer-Oriented Food Sales	\$4.5
Exports*	\$1
Imports*	\$3
Inventory	N/A
Total Sales	\$4.5
Retail	\$2.8
Food Service	\$0.400

Note: \* Refers to consumer-oriented products only.

### Top Jordan Hotels & Restaurants Chains & Retailers

- Marriott International
- Hilton International
- Four Seasons
- Mövenpick Hotels
- Sheraton
- Le Royal
- Inter-Continental
- Carrefour
- Safeway
- Sameh Mall
- JCSCC
- JMSCC
- Family Basket
- The Basket (online)

### **GDP/Population**

Population (millions): 11.3 (2023)

GDP (billions USD): \$46.3 (2022), \$45.3 (2021)

GDP per capita (*USD*): 4.2 (2022)

Sources: World Bank, International Monetary Fund, Economist Intelligence Unit, Central Intelligence Agency, Jordan Department of Statistics, FAS Amman.

### Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses	
1. The U.SJordan FTA	1. High tariffs	
2. Consumer acceptance of	2. Complex import	
U.S. origin products	regulations	
	3. Small consumer market	
Opportunities	Threats	
1. Growing demand	1. Trade competitors with	
2. Currency stability,	free trade agreements	
Jordanian dinar pegged to	2. Trade competitors with	
the U.S. dollar	closer proximity	

Data and Information Sources: FAS Amman office research. Contact: FAS Amman Amman.AgAmman@fas.usda.gov

# SECTION I – MARKET OVERVIEW

The Hashemite Kingdom of Jordan (Jordan) is a small with 46,000 square miles (89,342 square kilometers), largely landlocked country in western Asia. It is located at the crossroads of Asia, Africa, and Europe. Jordan is the Arab country that shares the longest border with the State of Israel (307 kilometers) and with the West Bank (148 kilometers). It also shares land borders with Saudi Arabia (731 kilometers) and Syria (379 kilometers). Aqaba, the country's single port, is located along on the 26-kilometer southwestern coastline between Israel and Saudi Arabia.

The United States and Jordan enjoy a strong bilateral relationship. Jordan's central location in the Middle East makes it strategically important to the United States, its main ally. Jordan's policies remain pro-western and pro-Gulf Arab. The United States and Jordan completed the final phase-out of tariff reductions under the <u>U.S.-Jordan Free Trade Agreement</u> in 2010, resulting in the complete elimination of duties on nearly all products, including agriculture. Jordan is an important advocate for peace in the Israeli-Palestinian conflict.

Jordan's population of 11.3 million inhabitants (Jordan Statistics department, January 2023 estimate), are in the west and northwest of the country and in and around the capital city of Amman (4.2 million); there is a sizeable population along the Gulf of Aqaba in the south. The population is rapidly growing by as fast as 2.92 percent per annum; adding a quarter of a million new consumers annually. The country is urbanized with 91 percent of the population residing in urban areas; urbanization is growing at a 2.43 percent annual rate of change (2015-20 estimate).

Agriculture accounts for over 11.5 percent of the land use: arable land (2 percent), permanent crops (1 percent), and permanent pasture (8.5 percent). Agricultural production accounts for about 4.5 percent of gross domestic product (GDP) in 2022, employing by some estimates 2-3 percent of the labor force (or some 62,000 people). Local agricultural production produces only a small share of the local food supply; Jordan is an insignificant producer of wheat.

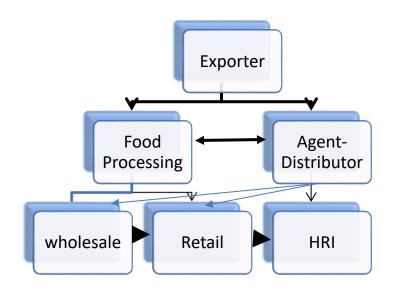
Table 1: Advantages and Challenges Facing U.S. Suppliers, Consumer-Oriented Products

#### **Advantages Challenges** • Jordan is a net food-importing country, dependent • Jordan's free trade agreements with the European Union (EU) and Canada are on imports for 98 percent of its consumption. increasing competition. • U.S.-origin food products and ingredients have a good reputation; associated with high quality, these • Cost of freight is high due to the distance. enjoy acceptance in the Jordanian market. • Geographic proximity favors EU-origin • Strong demand for high-value U.S. products in the products. hotel, restaurant sector and high-end retails. • Adoption of EU standards. • There is growing demand for high-value, highly • Jordanian import regulations are at times nonprocessed ingredients. The Jordanian food transparent, especially those overseen by Jordan processing is growing; it requires more imported Food and Drug Administration. food ingredients. Companies seek new ingredients, • Imported consumer-oriented products face especially affordable unprocessed commodities. higher tax rates. • New-to-market products benefit from the recent • The devaluation of EU Euro versus US Dollar. expansion of supermarket and hypermarket chains

# **Section II – Exporter Business Tips**

**Market Research:** U.S. exporters should identify a Jordanian importer or distributor, with whom they can build a relationship. Jordanian firms are best suited to navigate local regulations, understand distribution chains, and have relationships with retailers, food processors, and hotels, restaurants and institutions.

Market Structure: Jordan's market structure is straightforward. Importers are food processors, manufacturers, and or agents/distributors of these, as well as generalists who import a wide range of food products. Larger companies source their food ingredients and products directly to lower prices, guarantee product flow, and ensure quality. Agents/distributors service the food processing and manufacturing sectors. It is important for U.S. exporters to work with someone locally who knows the market well for a specific product.



**CHART 1: Jordan, Ingredients Import Distribution Channel** 

General Consumer Tastes and Trends: Jordan is traditionally price sensitive, but consumer behavior is changing. Young Jordanians' lifestyle and aspirational purchases are increasing thanks to greater exposure to global trends and brands. These consumers (within the 15-32 cohort) account for Jordan's largest gross income concentration, despite relatively smaller incomes. Supermarket chains are the main channel for marketing imported food products, targeting middle- and upper-income consumers. Indications are that the demand for upscale goods and services will remain strongest through 2030 amongst the country's top income band, those making over \$150,000 per annum. The Jordanian dinar (JOD) is the official currency of Jordan; it is pegged to the U.S. dollar at JOD 0.710 to \$1.00.

The fuel price's surge (Increase of fuels and electricity prices by 25.61%) is exerting extra pressure on the household expenditure, taking extra share to pay for heating and transportation, The surge pushed the consumer's price index 6 percent in the fourth quarter of 2022. Amman counts with high levels of average per household spending. Average expenditure in 2016 for upper-income households is

reportedly \$39,000 (with an estimated 20 percent of discretionary spending going to food purchases). Middle-income households on average spent \$14,000 (with an estimated 40 percent of discretionary spending going to food purchases). No updated study on this matter.

Jordan counts with about 34 percent middle class households (2017 estimate) of the total number of households. The economically active population is around 6.25 million people, or 61 percent of the total population (including refugees). FAS Amman (Post) estimates that the middle class (mainly what are termed class b and c consumers) numbers around 2.0-2.2 million people. The average Jordanian family size is about 4.8 persons.

# SECTION III – IMPORT FOOD STANDARDS AND REGULATIONS AND IMPORT PROCEDURES

**Customs Clearance:** Article 31 of the Customs Law of 1998 and its amendments establishes that all customs declarations must include the following (Jordan customs reserves the right to request additional documentation):

- A maritime or airway bill of lading.
- A commercial invoice indicating the value, weight, and freight and insurance charges. All invoices require Jordanian diplomatic/consular approval. In the absence of Jordanian diplomatic/consular approval, Jordan's Customs Director is empowered to accept the country of export's chamber of commerce certification.
- Commercial invoices are required to describe the product in Arabic.
- A notarized certificate of origin issued by the competent authority in the export country.
- A value declaration form for shipments exceeding JOD 2,000 (~\$2817).

Customs Valuation: Jordan's Custom Law (1999) as amended in March 2000 includes World Trade Organization (WTO) compliant criteria for customs valuation, based on certified commercial invoices. Increased transparency restricts the recourse to arbitrary valuation, but it does favor undervaluation. Jordan's customs authority utilizes cost-insurance-freight (CIF) prices for valuation purposes. Commercial invoice values require conversion into Jordanian dinars at the official rate. In some cases, Jordan's Customs will factor into its valuation calculations exporter discounts. Imported products, as well as locally produced goods are subject to a 16 percent value-added tax (VAT). Agricultural and pharmaceutical products are exempt from the 16 percent sales tax. Jordan's General Sales Tax Department levies a special sales tax on specific items such as tobacco products and alcoholic beverages. These are subject to a 13 percent general sales tax in addition to the special sales tax. Non-basic foodstuffs are subject to a 4 percent general sales tax (see GAIN-JORDAN – (JO18003) Jordan Levies New Special Taxes on Food and Beverage Products).

**Special Import Provisions:** Pre-import clearance is required for certain commodities. The clearance acts as an import license. The Ministries of Agriculture (MoA), Industry, Trade, and Supply (MoITS), and Health (MoH) issue import licenses. The Ministry of Agriculture issues pre-import clearances for live animals, fresh/chilled/frozen beef and beef products, embalmed wild animals, frozen animal semen, milk products. The Ministry of Industry, Trade, and Supply oversees the issuing of pre-import clearances for barley, rice, wheat, flour, sugar, and corn. The Ministry of Health issues pre-import

clearances for medications and antibiotics, athletic food supplements, potassium bromide, food dyes, ice cream, and baby food. In case of rejection, appeals are permissible.

Import licenses (valid for one year) are required for the following:

- Non-commercial shipments exceeding JOD 2,000 (~\$2817).
- Biscuits of all types.
- Mineral water.
- Dried milk for industry use.
- Items that require prior clearance from the respective authorities.

**Inspection and Clearance:** Jordan maintains the <u>ASYCUDA</u> computerized customs clearance system, simplifying customs clearance procedures. The Ministry of Agriculture along with the <u>Jordan Food and Drug Administration</u> (FDA) and the <u>Jordan Customs Authority</u> form the border committee that inspects inbound food and agricultural product shipments. Goods entering the country under temporary entry status, bonded goods, and goods benefiting from the investment promotion law are <u>exempt from import licenses</u>) (see <u>GAIN JORDAN – (JO-2021-0008) FAIRS Jordan Country Narrative 2021 Annual and GAIN JORDAN – (JO-2020-0018) FAIRS Jordan Certificate 2020 Annual)</u>.

Imported food and agricultural products are subject to inspection and testing when destined for human consumption. Virtually all prepared and mixed foods are subject to testing at the border. The Jordan Food and Drug Administration will also inspect food products at the wholesale and retail levels. A representative may enter any locality and collect samples for testing. If a product fails to meet technical requirements or deemed unfit for human consumption, it is subject for removal and destruction (see GAIN JORDAN – (JO2022-0001) Jordan Biotechnology Annual 2022).

**Country Language Labeling Requirements:** Imported products must comply with labeling and marking requirements issued by the <u>Jordan Standards and Metrology Organization (JSMO)</u>. It is advisable that the U.S. supplier ask his importer to provide him with an authenticated copy of the latest Jordanian standard for the type of the product for to export to Jordan, failing to meet the Jordanian standard may lead to the rejection of the consignment.

The Jordan Standards and Meteorology Organization regulates food additives for the Jordan Food and Drug Administration. Permissible additives and their concentrations are those approved by the <u>Codex Alimentarius</u> (Codex) Commission. The technical standards for foods contain specific lists for food additives and their permissible levels of use. The review of standards is required ensure that additives imports are permissible.

The translation into Arabic of the foreign language label information is required. Inconsistency in the translation may result in a rejection. Arabic labeling can be printed on the package or be a permanent adhesive label. Products cannot show more than one date of manufacture or expiration. Erasures, Scratch outs, or alterations of labels is not permissible.

Nutritional labeling is mandatory for certain categories of food such as infant formula and food for dietary use. A label needs to contain the product's name, the manufacturer's name and address, net weight, fortifying matter, lot number, and best before date. Shipments are subject to rejection if labeling

content is ambiguous. The Jordan Ministry of Health and the JSMO provide food labelling and packaging information.

**Export Certificates:** Jordan requires export certificate for a number of food products (see <u>GAIN JORDAN – (JO-2021-0008) FAIRS Jordan Country Narrative 2021 Annual</u> and <u>GAIN JORDAN – (JO-2020-0018) FAIRS Jordan Certificate 2020 Annual</u>).

Tariffs and Free Trade Agreements (FTA): Jordan follows the <u>international nomenclature for the classification of products Harmonized System (HS)</u>. The <u>Jordan Customs Authority</u> provides tariff tables for different products and commodities, as well as products subject to additional taxes. The <u>Jordan Income and Sales Tax Department</u> lists these general and special sales taxes.

Since February 2013, Jordan has imposed a special tax on twelve luxury commodities; taxes range between 5-25 percent (e.g., pet foods are subject to 20 percent levy).

Trademarks and Patents Market Research: Jordan's legal system protects the acquisition and disposition of intellectual property rights. Prior to its WTO accession, Jordan passed a series of laws strengthening the protection of intellectual property rights for patents, copyrights, and trademarks. Jordan counts with Trade Related Aspects of Intellectual Property Rights (TRIPS) consistent legislation, requiring the registration of patents, copyrights, and trademarks. The Ministry of Industry and Trade's Registrar of Patents and Trademarks registers patents and trademarks. While copyrights are registered with the Ministry of Culture's National Library. Jordan is seeking to become a contracting state to the Patent Cooperation Treaty and the protocol relating to the Madrid Agreement (registration of marks). It is already a member of the World Intellectual Property Organization (WIPO) and the Union for the Protection of New Varieties of Plants (UPOV).

# SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

### **Key Developments for Top Five Sectors:**

**Best Consumer-Oriented Product Prospects:** U.S.-origin cheese, higher value beef muscle cuts and beef products, as well as chicken leg quarters, nuts, and breakfast cereals show strong potential growth possibilities. U.S. confectionary products are also increasingly popular, but Jordan's 2018 decision that restricts the sale of products labeled as containing genetically engineered ingredients is disrupting trade, post involvement had the situation resolved (see GAIN Agricultural Biotechnology Annual | JO2022-0001).

**Best High-Value, Consumer-Oriented Products Prospect Categories:** Jordan counts with increasingly westernized consumer tastes. Consumers are demanding a wider variety of foreign food and agricultural products that are attractively packaged and clearly labeled.

Consumer-ready products such as U.S.-origin fresh and frozen beef and beef products, dairy products (especially U.S. Midwestern cheese products) poultry, tree nuts, packaged-ready pulses, packaged rice, and consumer-ready groceries are in high demand. For upscale consumers, fancy food products and confectionary products are in demand. Packaged, frozen fish is ever more popular. Table 3 below indicates Jordanian agricultural production gaps; highlighting areas where U.S. consumer-ready, packaged products show good prospects if well marketed.

Table 2: Jordan, Select Best High-Value, Consumer-Oriented Products Prospect, Imports By HS-Code, CY 2018 and CY 2021

(\$ millions)

HS Code	Description	World Imports 2018	U.S. Imports 2018	World Imports 2021	U.S. Imports 2021
3038.9000	Hake Fish ( <i>Merluccius Spp.</i> , <i>Urophycis Spp.</i> ), Excluding Livers and Roes, Frozen.	7.3	0.2	16	0
3061.7000	Other Shrimps and Prawns, Frozen.	4.6	0.2	7.8	0
4011.0000	Milk And Cream, Not Concentrated nor Containing Added Sugar or Other Sweetening Matter, of a Fat Content, by weight, Not Exceeding (1%).	11.8	0.0	21.7	0
4021.0920	Milk In Granules or Other Solid Form Other Than in Powder, of a Fat Content, By Weight, Not Exceeding (1.5%), Containing Added Sugar or Other Sweetening Matter, Imported by Factories as Industrial Inputs.	7.1	0.0	12	0.9
4029.1000	Other Milk in Powder, Not Containing Added Sugar or Other Sweetening Matter, Not Elsewhere Specified or Included in This Chapter.	7.7	0.004	6.3	0.005
4029.9000	Other Milk in Powder, Containing Added Sugar or Other Sweetening Matter Not Elsewhere Specified or Included in This Chapter	7.7	0.07	10.5	0
4059.0000	Other Fat Substances of Milk Products, Except of Butter and Full-Fat Yoghurt.	10.6	0.0	7.9	0.0
4063.0000	Processed cheese, not grated, or powdered.	24.5	0.3	14.7	0.0
4069.0900	Other cheese, not elsewhere specified or included of heading no. 04.06.	78.7	4.6	92.9	2.0
4090.0900	Natural honey other than imported by factories as industrial inputs.	3.7	0.001	6.5	0.0
11.0313.000	Groats and meal, of maize (corn)	4.0	0.0	3.3	0.0
11.0813.000	Potato starch	4.2	0.0	3.6	0.0
12.0242.100	Groundnuts, not roasted or otherwise cooked, shelled, whether broken or not imported by factories as industrial inputs.	6.4	0.0	4.5	0.0
12.0740.000	Sesamum seeds, whether broken or not	40.6	0.0	50.4	0.0
15.0710.000	Soya-beans oil, crude untreated chemically, whether or not removed its gum.	31.7	2.1	18.0	0.0
	Refined sunflower-seed or safflower oil and its fractions, but not chemically modified, other than those imported by factories as industrial inputs.	19.0	0.003	13.5	0.0
15.1529.900	Refined maize (corn) oil and fractions thereof, but not chemically modified, other than those imported by factories as industrial inputs.	14.7	0.2	33.5	0.0
16.0414.000	Tunas, skipjack and bonito (sarda spp.), whole or in pieces, but not minced, prepared or preserved	42.1	0.0	31.3	0.0

Source: Jordan Department of Statistics (2017), FAS Amman office research.

## Section V – Agricultural and Food Imports

Table 3: Jordan, 3-Year Food and Agricultural Imports, CY 2019-21 (U.S. dollars-millions)

Item's Description		U.S.	World	U.S.	World	U.S.
	2019	2019	2020	2020	2021	2021
Meat and edible meat offal						
	373.4	12.6	339.3	9.7	311.6	9.5
Fish and crustaceans, mollusks and other aquatic						
invertebrates	62.4	0.3	62.2	1.0	60.9	0.5
Dairy produce, birds' eggs, natural honey, edible products of						
animal origin, not elsewhere specified or included	278.7	4.8	292.6	3.5	260.0	4.8
Edible vegetables and certain roots and tubers						
	71.1	2.5	84.8	1.4	64.0	2.5
Edible fruit and nuts; peel of citrus fruit or melons						
	309.1	61.0	339.8	63.2	245.2	44.9
Coffee, tea, mate' and spices						
	185.5	1.3	206.3	1.7	172.3	1.4
Products of the milling industry; malt; starches; inulin, wheat						
gluten.	22.9	0.3	20.0	0.3	17.4	0.3
Oil seeds and oleaginous fruits miscellaneous grains, seeds						
and fruit; industrial or medical plants; straw and fodder	147.7	7.2	163.9	8.7	131.0	6.7
Animal or vegetable fats and oil and their cleavage products;						
prepared edible fats; animal or vegetable waxes	162.6	4.8	178.2	4.4	202.9	2.5
Preparations of meat, of fish, or of crustaceans, mollusks or						
other aquatic invertebrates	66.5	0.5	86.2	0.3	51.6	0.4
Sugars and sugar confectionery						
	164.0	1.5	208.8	1.5	166.0	1.1
Cocoa and cocoa preparations						
	89.0	2.8	91.6	2.4	79.5	2.8
Preparations of cereals, flour starch; or milk, pastrycooks,						
products	195.0	3.1	243.3	5.4	205.7	4.0
Preparations of vegetables, fruit, nuts or other parts of plants						
	141.4	2.9	131.7	4.9	118.8	2.3
Miscellaneous edible preparations						
	268.8	24.4	264.8	23.3	250.9	21.2
Beverages, spirits and vinegar						
	128.4	2.7	174.2	3.4	137.4	3.0

NOTE: Import values reported in Cost-Insurance-Freight (CIF) terms.

Source: FAS Amman office research.

### SECTION VI – KEY CONTACTS AND FURTHER INFORMATION

U.S. Embassy Amman, USDA-Foreign Agricultural Service (FAS) Office of Agricultural Affairs Physical Address: American Embassy, Abdoun, Al-Umawyeen Street, Amman, Jordan Phone: (962-6) 590-6056 ● Fax: (962-6) 592-0146 ● <u>AgAmman@fas.usda.gov</u>

(\*) NOTE: The GAIN Report System was redesigned in 2019 and includes reports from all previous legacy systems going back to 1995. Because these reports were created in different systems, it might be necessary to try a variety of search options to retrieve older reports.

SEARCH GAIN: <a href="https://gain.fas.usda.gov/#/search">https://gain.fas.usda.gov/#/search</a>

### GOVERNMENT OF JORDAN REGULATORY AGENCY CONTACTS

## **Ministry of Agriculture**

Veterinary Services Directorate and Plant Protection Directorate

Tel: (962-6) 568-6151 · Fax: (962-6) 568-6310 · Website: www.moa.gov.jo

## **Ministry of Environment**

Tel: (962-6) 556-0113 · Fax: (962-6) 556-0288 · Website: <u>www.moenv.gov.jo</u>

## Ministry of Industry, Trade and Supply

Tel: (962-6) 560-7191/566-3774 • Fax: (962-6) 560-4691 • Website: www.mit.gov.jo

### **Jordan Standards and Metrology Organization**

Tel: (962-6) 568-0139 • Fax: (962-6) 568-1099 • Website: www.jsmo.gov

## **Jordan Food and Drug Administration**

Tel: (962-6) 461-2663 • Fax: (962-6) 461-2663 • Website: www.jfda.jo

## **Jordan Customs Authority**

P.O. Box 90, Amman, Jordan

Tel: (962-6) 462-3186/8; 462-4394/6 • Fax: (962-6) 464-7791 E-mail: Customs@Customs.gov.jo • Website: www.customs.gov.jo

# **Agaba Special Economic Zone Authority**

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### **Attachments:**

No Attachments.