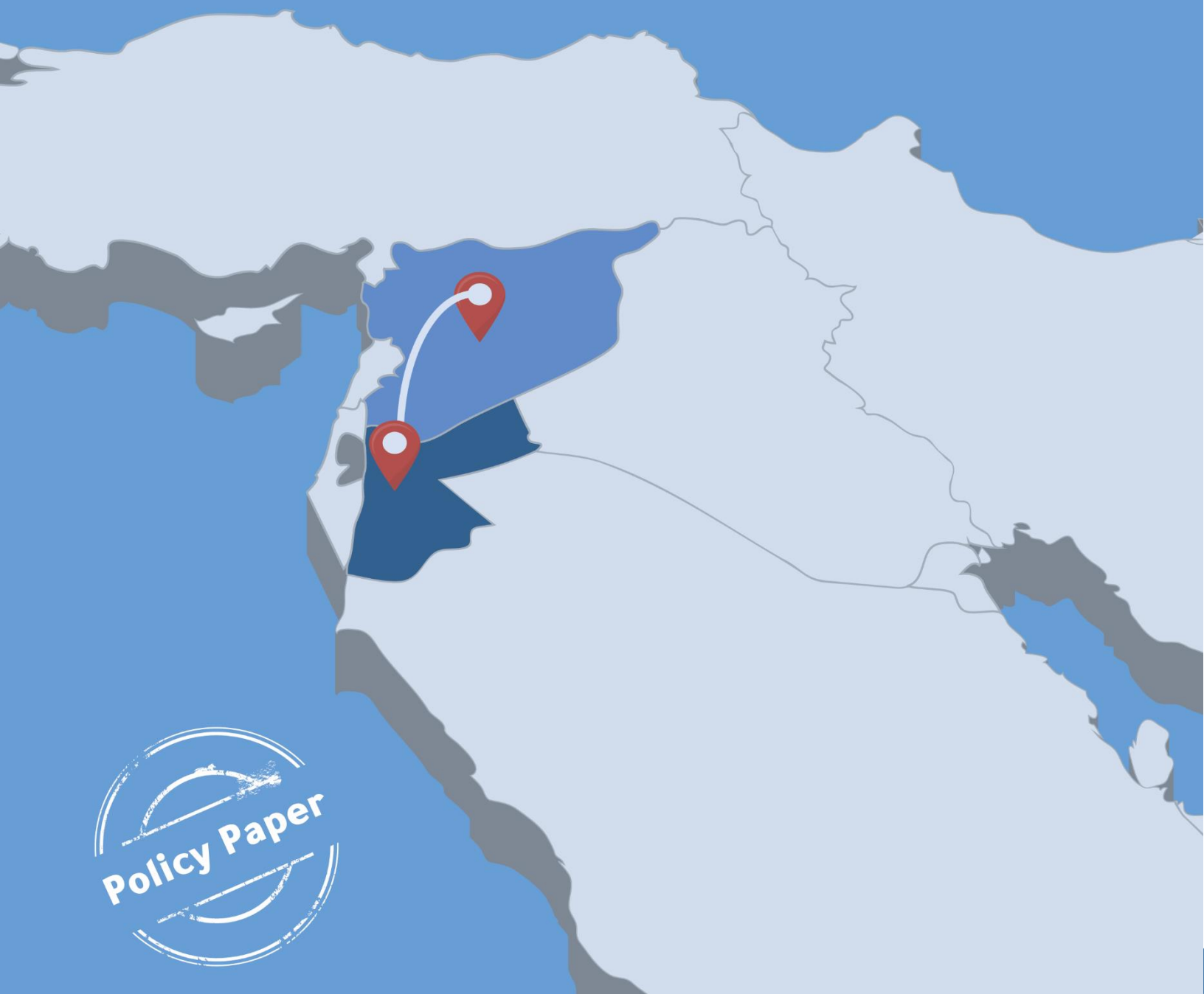




منتدى الاستراتيجيات الأردني  
JORDAN STRATEGY FORUM

# Prospects for Trade and Economic Cooperation Between Jordan and Syria: A Launchpad for Pan-Arab Integration

December 2024





## منتدى الاستراتيجيات الأردني JORDAN STRATEGY FORUM

The Jordan Strategy Forum (JSF) is a not-for-profit organization, which represents a group of Jordanian private sector companies that are active in corporate and social responsibility (CSR) and in promoting Jordan's economic growth. JSF's members are active private sector institutions, who demonstrate a genuine will to be part of a dialogue on economic and social issues that concern Jordanian citizens. The Jordan Strategy Forum promotes a strong Jordanian private sector that is profitable, employs Jordanians, pays taxes and supports comprehensive economic growth in Jordan.

The JSF also offers a rare opportunity and space for the private sector to have evidence-based debate with the public sector and decision-makers with the aim to increase awareness, strengthening the future of the Jordanian economy and applying best practices.

For more information about the Jordan Strategy Forum, please visit our website at [www.jsf.org](http://www.jsf.org) or contact us via email at [info@jsf.org](mailto:info@jsf.org). Please visit our Facebook page at [Facebook.com/JordanStrategyForumJSF](https://Facebook.com/JordanStrategyForumJSF) or our Twitter account [@JSFJordan](https://twitter.com/JSFJordan) for continuous updates about Jordan Strategy Forum.



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**Policy Paper: A policy paper is a research piece which focuses on a specific issue or problem and provides clear recommendations for policy makers**

### To evaluate the study



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## Introduction

The Arab region, with its diverse geography, demographics, and economic foundations, represents a comprehensive framework of untapped potential for development and regional cooperation. Spanning two continents—Asia and Africa—and linked to all global regions, the Arab world, with a combined population of approximately 482 million, comprises 22 countries that together account for 3.3% of global GDP, about 6% of the world population, and around 5.7% of global trade.

Despite this, data from the World Trade Organization (WTO) indicates that intra-Arab trade remains modest. In 2023, it accounted for only 14.9% of the Arab world's total external trade. This is indeed a low figure given the region's geographic and demographic proximity.

Several agreements whose aim is to enhance regional economic integration exist. These include the Greater Arab Free Trade Area (GAFTA), Agadir Agreement, and many bilateral trade and economic arrangements. However, decades of regional political and economic instability have hindered these efforts. Notably, Syria—once a key player—has been largely absent due to prolonged conflict and international sanctions.

In the context of the above-mentioned observations, reviving economic and trade relations between Jordan and Syria presents a crucial opportunity to re-energize regional integration—especially considering the recent developments in Syria and growing interest in restoring cooperative frameworks.

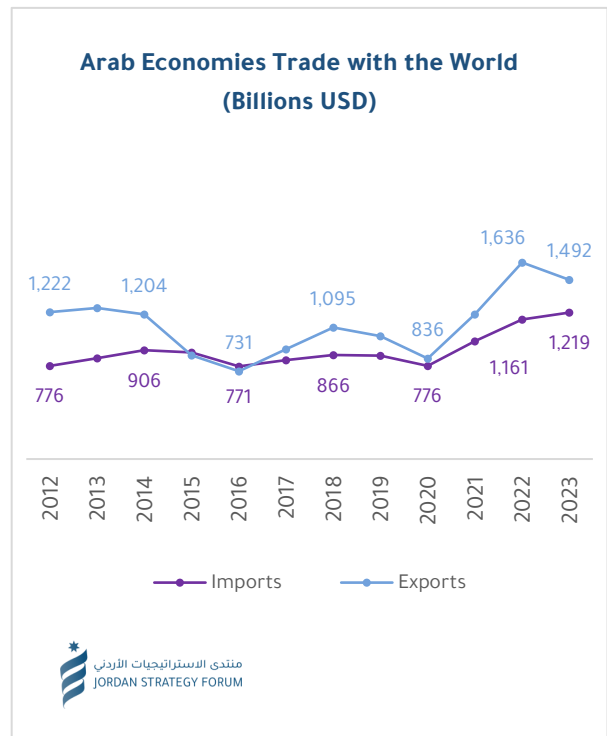
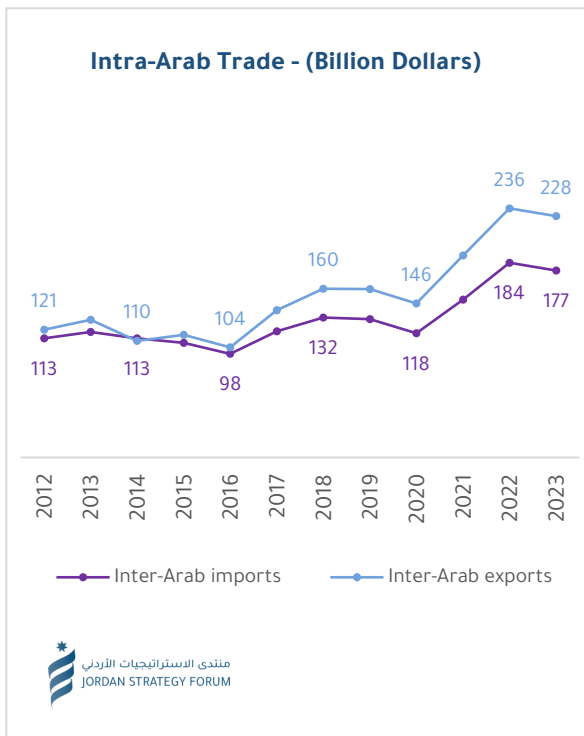
This policy paper, published by the Jordan Strategy Forum (JSF) seeks to highlight the mutual advantages Jordan and Syria possess, propose actionable trade-enhancing solutions, and position bilateral cooperation as a springboard for sustainable and inclusive regional development.

The paper is structured around the following key themes:

1. The need for comprehensive Arab economic and trade integration.
2. The historical and prospective role of Jordan-Syria trade in supporting regional cooperation.
3. An revealed comparative advantages (RCA) analysis between the two economies.
4. The impact of the Caesar Act on Jordan's economy.
5. Jordan's potential contribution to Syria's reconstruction efforts.
6. JSF's key policy recommendations.

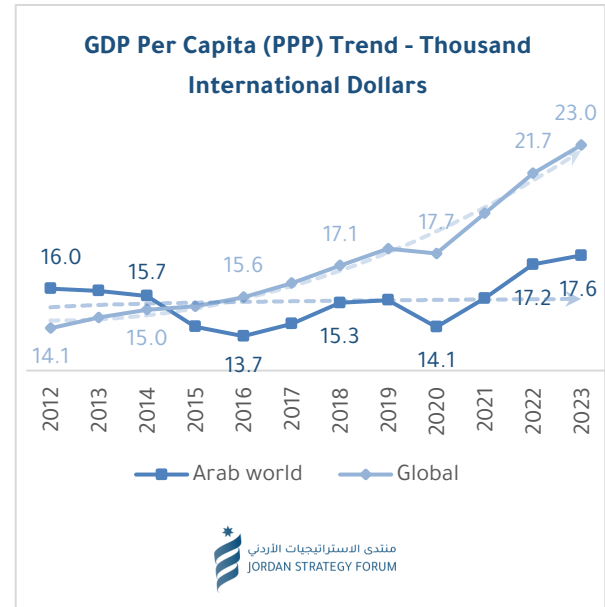
## 1. The Need for Comprehensive Arab Economic and Trade Integration

- According to the WTO's database, **the total value of Arab exports to global markets in 2023 reached approximately \$1,491.8 billion. This figure represents 6.3% of total global exports.** Similarly, Arab total imports amounted to \$1,218.9 billion, or 5.1% of global imports.
- Intra-Arab trade in the same year stood at about \$405.3 billion.** This figure is split between \$228.4 billion intra-regional exports and \$176.9 billion intra-regional imports. In other words, **intra-Arab trade represented only 14.9% of total Arab external trade.** This level is notably low when compared with other global economic blocs. For example, intra-EU trade makes up around 58% of the European Union's total external trade.



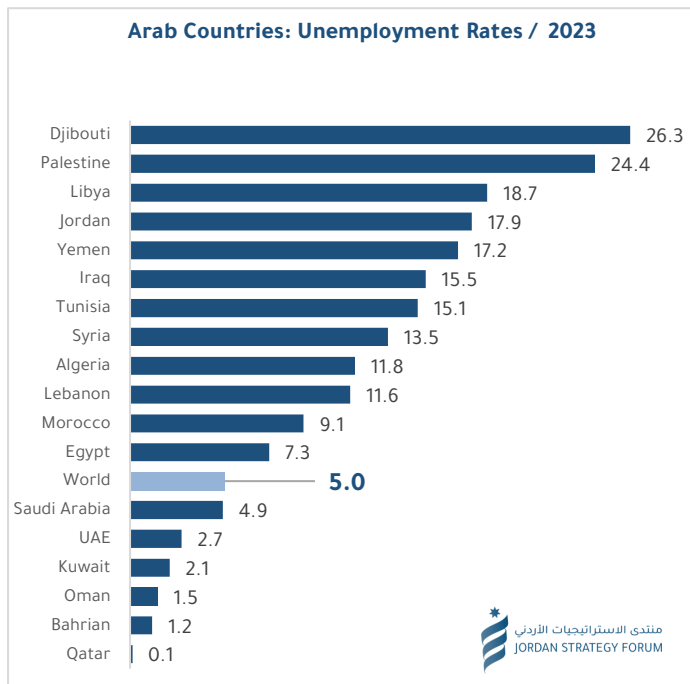
Source: World Trade Organization, 2024

- In 2023, the overall mean of the Arab countries' GDP **per capita based on purchasing power parity (PPP)** was estimated at \$17,600. This figure is well below **the global average** (\$23,000). In addition, it is worth noting that this figure has remained largely stagnant over the past decade, while the gap between the Arab average and the global average continued to widen year after year.

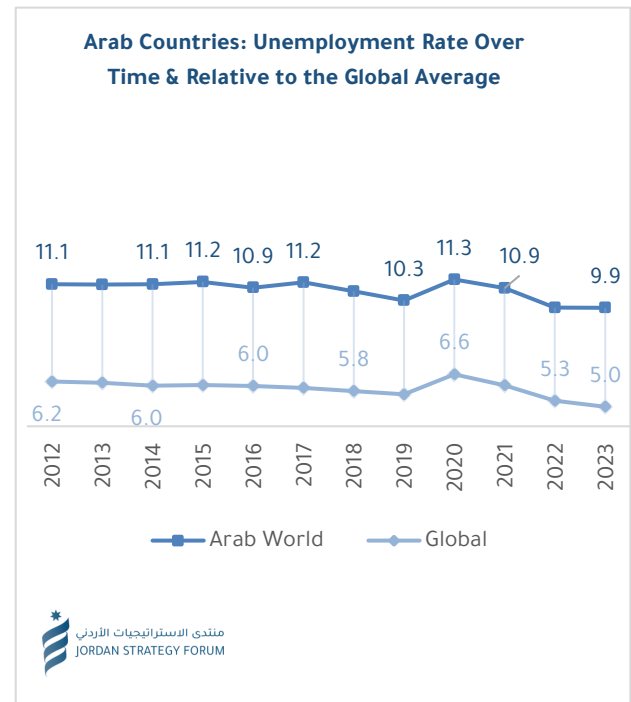


Source: World Trade Organization, 2024

- Unemployment remains one of the most critical challenges facing the Arab economies (excluding Gulf Cooperation Council countries). **Eight Arab nations rank among the top 20 globally in unemployment rates** (International Labor Organization / ILO).



Source: ILO Database, 2024



- Regarding the **labor force participation** rate in the Arab world (percentage of the population aged 15 to 64 years who are economically active), it is noticeably **much lower than the global average**. In 2022, this rate was about 48%, while the global average stood at 66.2%. The female labor participation rate in the Arab countries is even lower (only 11%).



Source: ILO Database, 2024

Given the above-mentioned challenges, **there is a pressing need to stimulate economic growth in the Arab region and enhance external trade, particularly intra-Arab trade**. The region possesses numerous strengths that can support integration and these include geographic proximity, diversity of natural resources, and a young and capable human capital base.

Today, much attention is focused on developments in Syria, which may be entering a new phase—especially if sanctions such as the **“Caesar Act”** are lifted. There lies a significant opportunity to engage in Syria’s reconstruction in a way that embodies regional cooperation and shared prosperity.

Effective Arab integration can begin with successful bilateral partnerships that serve as building blocks for wider regional alignment. Strengthening cooperation between Jordan and Syria could be a model for broader, sustainable development across the Arab world.

## 2. Economic and Trade Relations Between Jordan and Syria and Their Role in Advancing Arab Cooperation

The economic and trade ties between the Hashemite Kingdom of Jordan (HKJ) and the Syrian Arab Republic are deeply rooted, with a history of decades-long cooperation. This relationship once formed a solid foundation for mutual economic growth and integration. However, the outbreak of the Syrian conflict in 2011 marked a significant turning point, causing a sharp decline in bilateral relations across economic, trade, investment, and social dimensions. The closure of border crossings, especially between 2012 and 2018, severely disrupted the flow of goods and people. Compounding this disruption were economic sanctions, most notably the implementation of the **Caesar Act** in 2019 which further strained trade and financial linkages between the two countries.

The close geographic proximity and economic interdependence between Jordan and Syria meant that the economic deterioration and sanctions imposed on Syria has also had spillover effects on Jordan. This dynamism is often explained through the **“gravity model”** in international trade. In other words, countries with close geographic proximity are more likely to experience shared economic outcomes, both positive and negative.

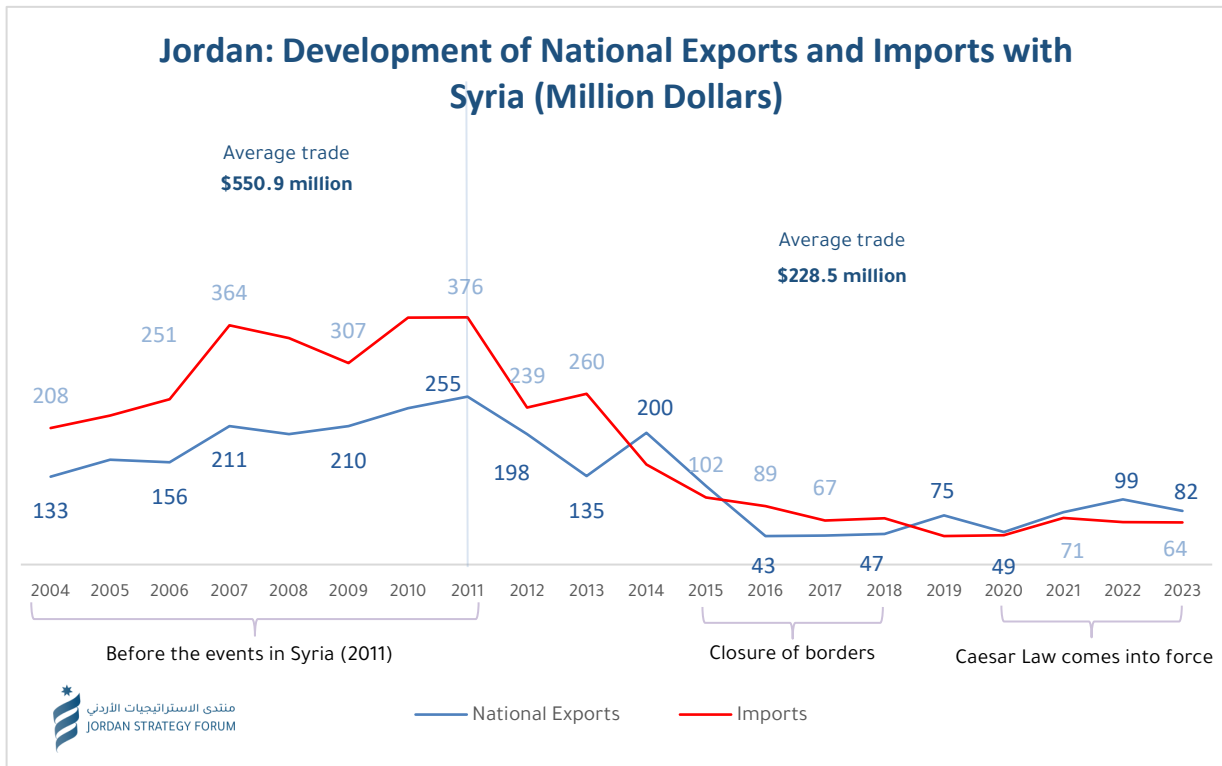
Considering recent developments, Jordan is actively seeking to restore and strengthen its economic and trade relationship with Syria. This revival is viewed as a potential starting point for broader Arab economic integration, beginning with enhanced bilateral cooperation that delivers mutual benefits and contributes to regional stability.

To lay the groundwork for renewed cooperation, it is necessary to assess the economic potential of both countries, identify areas of comparative advantage, and understand the obstacles preventing the full realization of their bilateral trade potential.

### 2.1. Bilateral Trade Between Jordan and Syria

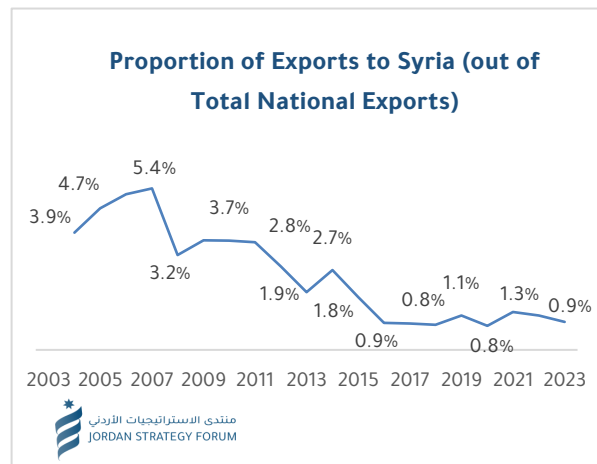
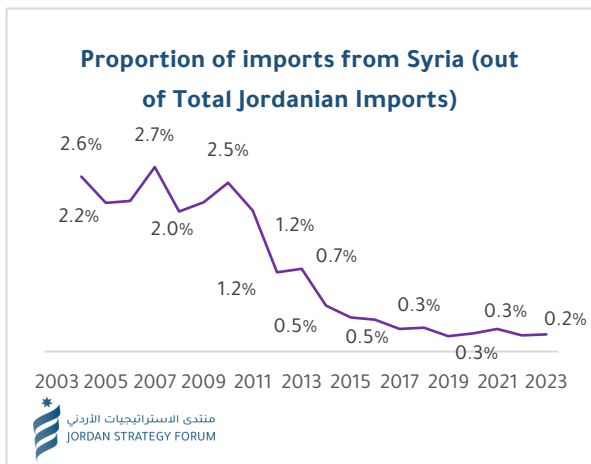
During the period 2004-2011, trade between Jordan and Syria witnessed strong growth. Indeed, within a few years, total Jordanian exports to Syria increased from \$ 208 million to \$ 376 million by the end of 2011. However, this upward trend began reversing after 2011, and by 2023, total bilateral trade had dropped to just \$181.8 million. Naturally, this decline was primarily due to the political and economic turmoil in Syria.





Source: WTO, International Trade Centre Database, 2024

In terms of Jordan's overall foreign trade, Syria's share has plummeted. **National exports to Syria declined** from 5.4% in 2007 to less than 1% in 2023. Similarly, imports from Syria fell from 2.7% to just 0.2% in the same period.



Source: Department of Statistics, 2024

**Prior to 2012, trade between the two countries was characterized by a high degree of product diversification.** Indeed, about 75 different commodity groups were exchanged (out of a total of 96 international trade categories). In 2023, this figure fell to under 45 groups. The trade disruption affected several industries:

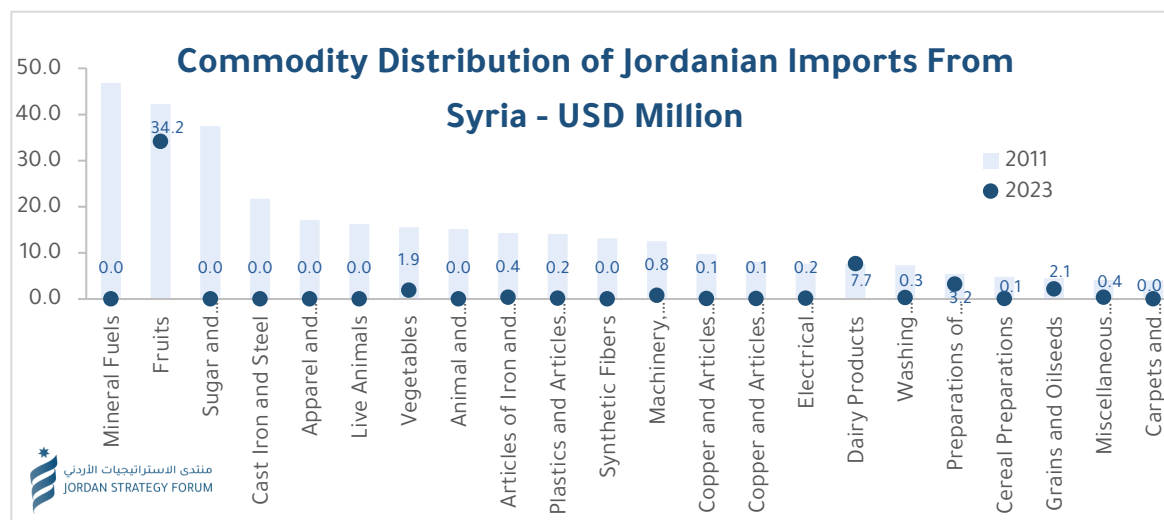
- Processed food (e.g., dairy, cocoa products).
- Fresh vegetables and livestock.

- Textiles and carpets.
- Synthetic fibers.
- Stone and cement-based products.



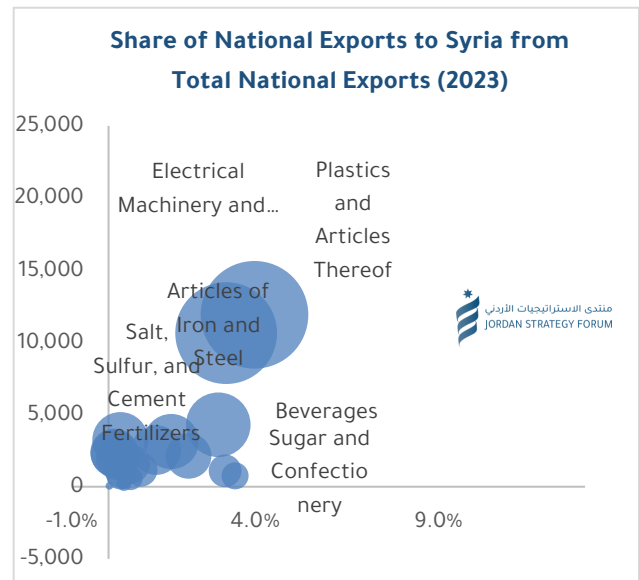
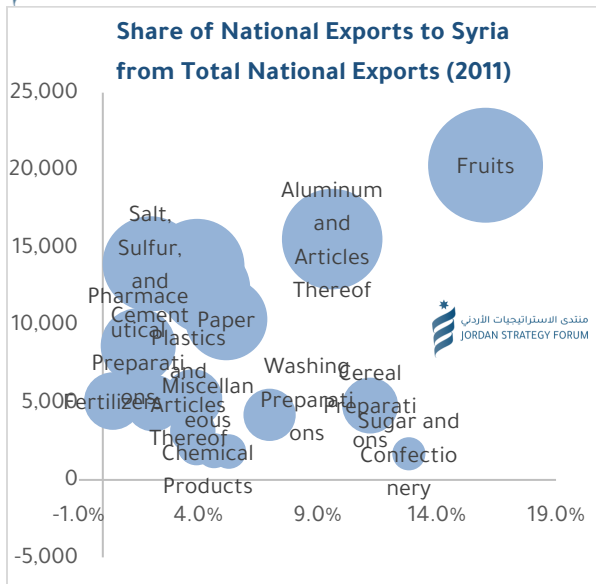
Source: Department of Statistics, External Trade, 2024.

Jordan's imports from Syria were also impacted by the 2011 events. Many Syrian industries have ceased exporting to the Jordanian market, particularly in sectors such as petroleum derivatives, iron products, food industries, and others.



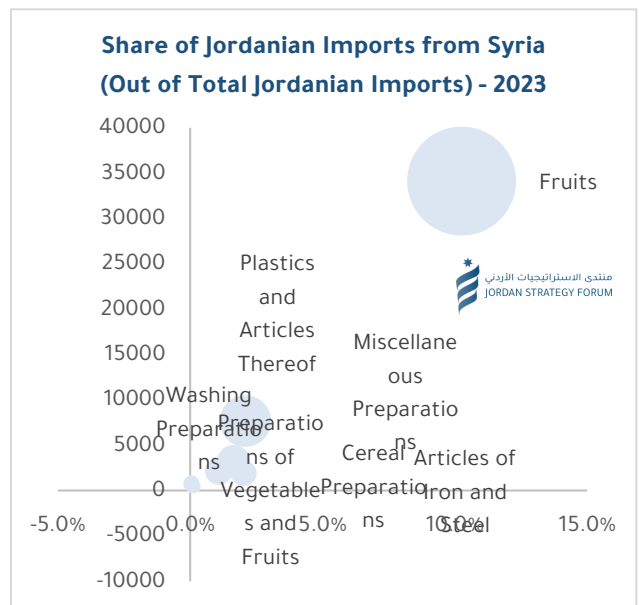
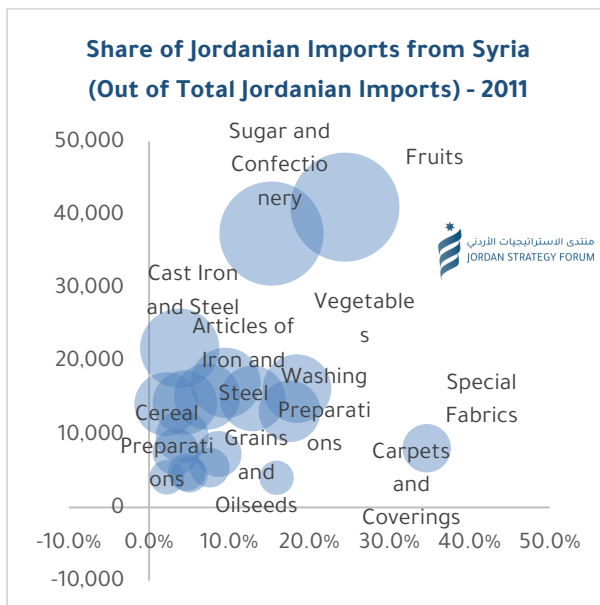
Source: Department of Statistics, External Trade, 2024

As far as the relative importance of national exports to the Syrian market is concerned, it is evident that they held a significant share prior to 2012. However, this share experienced a substantial decline in the years that followed.



Source: Department of Statistics, External Trade, 2024

Similarly, Jordan's imports from Syria have also seen a decline in the share of various imported goods as a percentage of Jordan's total imports.



Source: Department of Statistics, External Trade, 2024

To sum up, **there has been a significant decline in trade between the Jordan and Syria** (a decrease of approximately \$485 million when comparing 2011 to 2023). Therefore, it is imperative to work toward enhancing trade relations and restoring them to previous levels and more.

## 2.2. The Transportation Sector: Border Crossings Between Jordan and Syria

Jordan and Syria share a northern border stretching approximately 379 kilometers and are connected by two main border crossings: The Jaber-Nasib Border Crossing (for passengers and goods) and the Joint Jordanian Syrian Free Zone Crossing (for goods).

The two countries serve as a critical overland **transit route for exports to Asia**, particularly the **Gulf Cooperation Council (GCC) countries**, from **Europe and Turkey** via the Syrian Turkish Bab al-Hawa crossing, **and vice versa**, through transit trade.

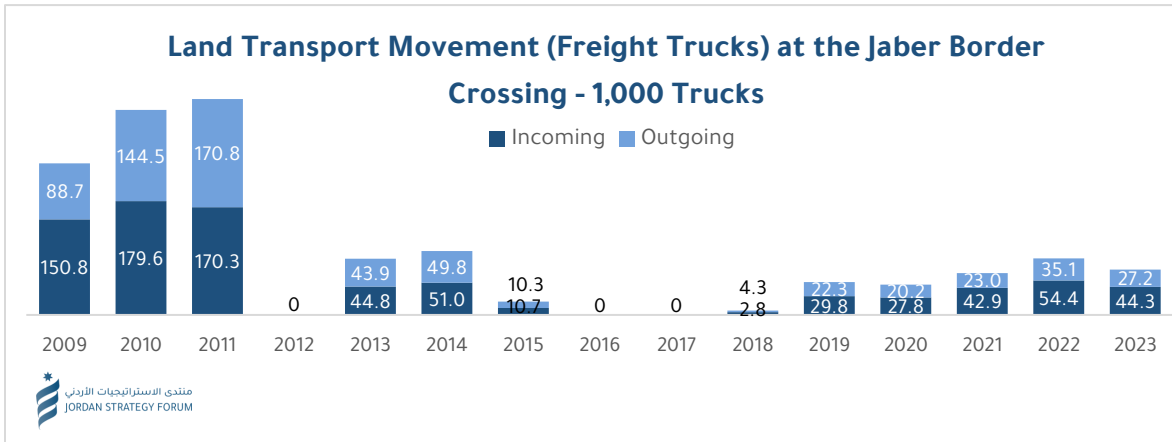
**For Jordanian trade, the Syrian market acts as a gateway to the European and Turkish markets. Similarly, for Syrian trade, the Jordanian market serves as a land corridor to the GCC markets.** This mutual interdependence underscores the importance of collaboration between the two nations to facilitate and enhance bilateral trade, while strengthening trade connectivity between Asia and Europe on a broader scale.

### Map of Foreign Trade Movement Through Land Ports Between the Asian and European Continents



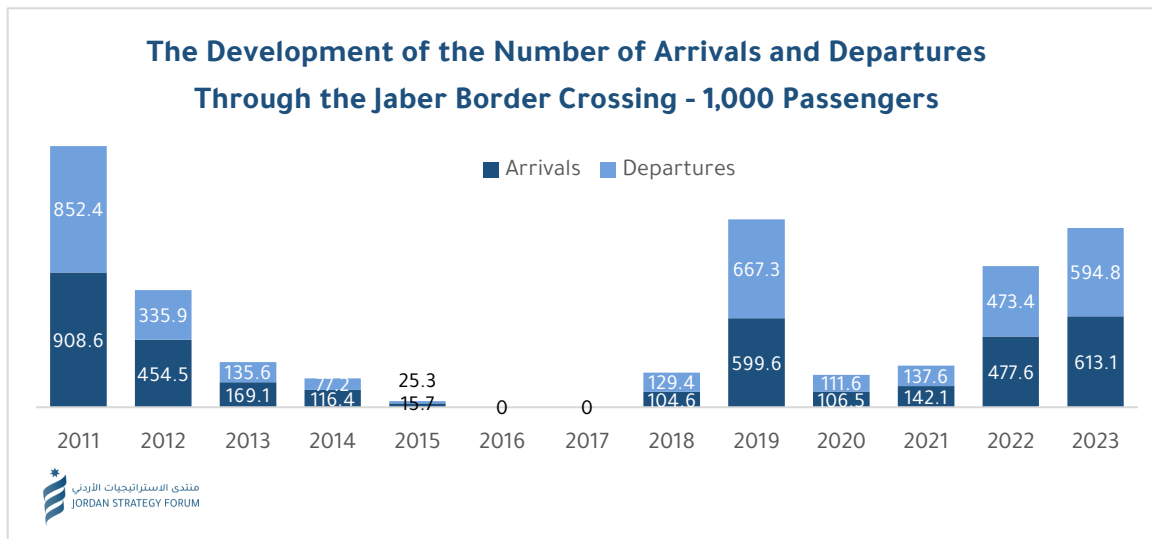
In 2011, the Jaber Border Crossing accounted for approximately 25% of Jordan's total foreign trade conducted through land crossings. By 2023, this share had declined sharply to around 8%. Before the onset of the Syrian crisis in 2011, an average of nearly 1,000 trucks entered and exited through the Jaber (Nasib) Crossing daily. This

number dropped significantly to an average of approximately 200 trucks per day in 2023 (Ministry of Transport / Jordan). It is also worth noting the periods of border closures, which halted the movement of trade and travelers between Jordan and Syria in 2012 and during the years 2015 to 2018.



Before the borders were closed, the number of clearing companies at the Jaber crossing reached around 240 companies. In 2023, however, the number of these companies has decreased to only 20 (Jordanian Association of Clearing and Freight Transport Companies).

In a related context, the available data also indicates a significant decline in the number of travelers between Jordan and Syria (via the Jaber crossing) following the events of 2011. The daily average of travelers (both arrivals and departures) dropped from approximately 4,838 in 2011 to around 2,171 travelers per day in 2012, and then further to 768 travelers per day in 2021. However, this number started to rise again, reaching nearly 3,318 travelers daily in 2023.



In conclusion, considering the significant incurred losses incurred, it is essential to strengthen cooperation between Jordan and Syria and overcome all the obstacles and challenges that hinder the expansion of bilateral trade and restore the vitality of trade exchange and transportation between the two countries and the region.

### 3. Revealed Comparative Advantage (RCA) Between Jordan and Syria

The Revealed Comparative Advantage (RCA) index is an effective and important analytical tool in studying trade relations between countries. **The RCA index identifies the products or sectors in which a country has relative advantages compared to another country.**

This analysis helps decision-makers and policymakers to direct joint cooperation efforts toward complementary sectors, identify sectors with high relative advantages, and contribute to building balanced economic partnerships, enhancing trade integration, and fostering mutual benefits.

The equation provided by Vollrath's formula is used to calculate the RCA index value and to compare the results of the two countries (Jordan and Syria) with each other. (The equation is outlined in Annex 1).

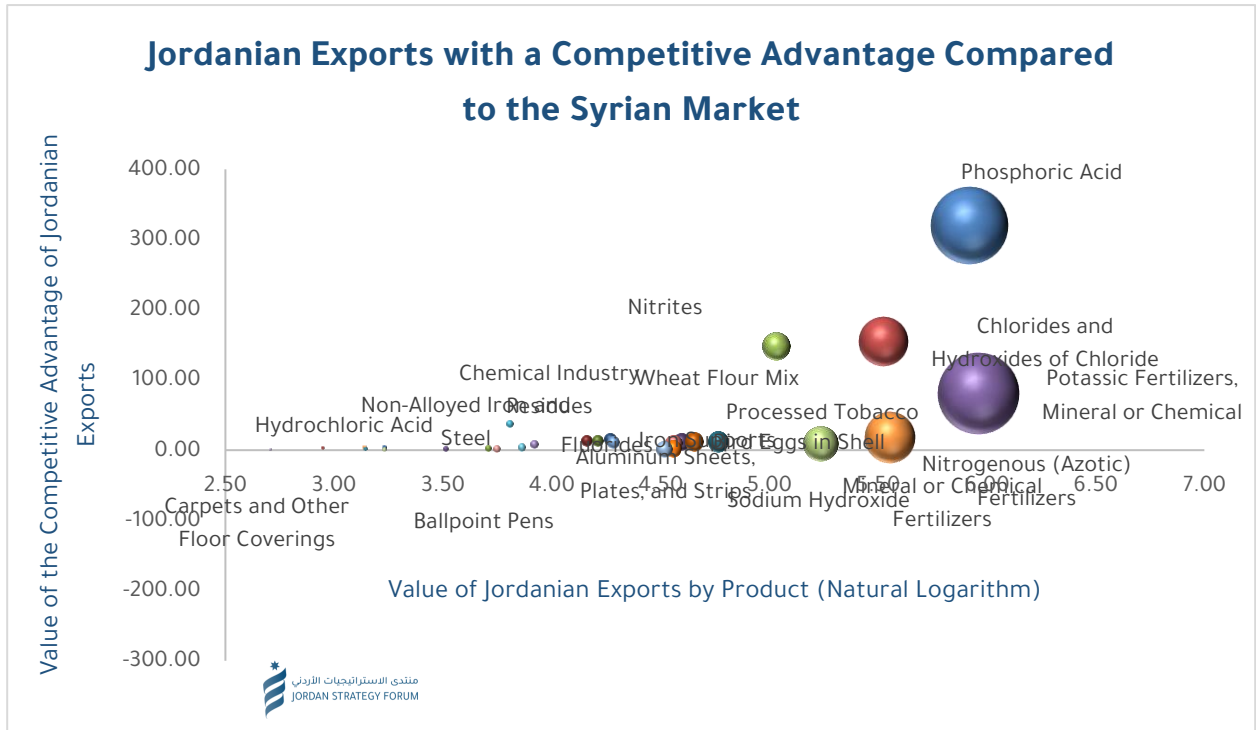
The RCA index for both Jordan and Syria is analyzed and studied at the level of all products according to their international classification (HS-4 Digits). This is done by calculating the RCA index value for each country separately. After determining the index's value for each product, Jordan's index is compared with Syria's index to identify the product in which each country has a comparative advantage. This allows for an understanding of each country's strengths in international trade.

#### Analysis Results:

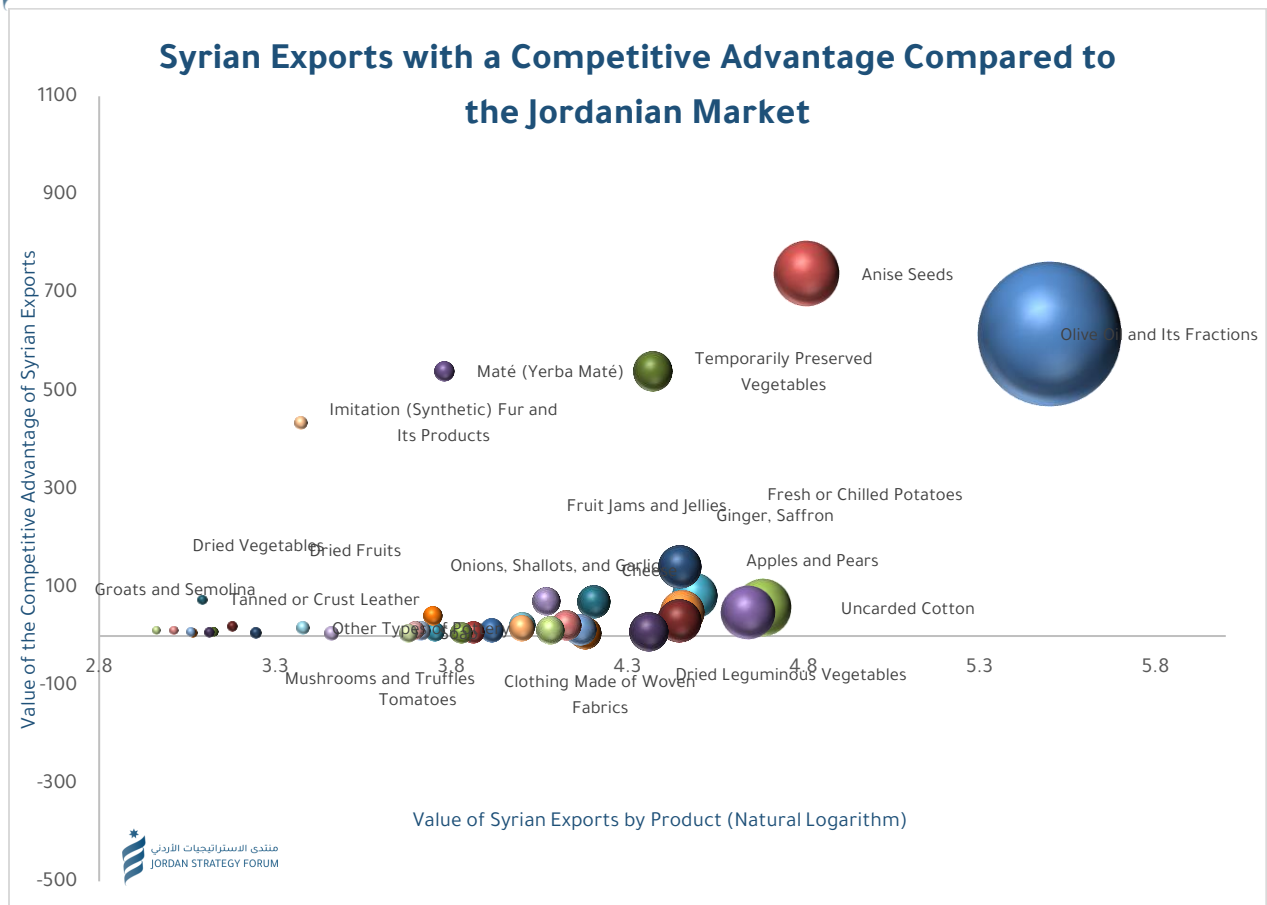
After studying and analyzing the **revealed comparative advantage** of approximately **930 products exported** from both the Jordanian and Syrian markets, based on the **HS-4 Digits** classification using data from the International Trade Centre, the following conclusions can be drawn:

- **Jordan has a comparative advantage in exporting approximately 600 products** compared to the Syrian market. Some of the key industries with a comparative advantage include chemical industries (fertilizers, organic and inorganic compounds), construction industries (cement, steel), certain food industries, and packaging industries.

- **Syria has a comparative advantage in exporting approximately 329 products** compared to the Jordanian market. The comparative advantage of Syrian exports is clearly concentrated in the food industries sector, as well as the leather and textiles sectors.



Source: Forum Analysis Based on the World Trade Organization Database, 2024



Source: Forum Analysis Based on World Trade Organization Database, 2024

**It is evident that both countries have a comparative advantage in some of their local exports compared to the other country's exports.** These findings can be utilized to identify the pillars of commercial integration between the two countries, enhance the flow of products and industries between them, and facilitate the transfer of knowledge, expertise, and manufacturing technologies. This would lead to a mutually beneficial economic and trade relationship based on complementarity rather than competition.

## 4. The Repercussions of the Caesar Act on the Jordanian Economy

**The Jordanian economy has been greatly affected by the U.S. sanctions imposed on the Syrian economy** which came into effect in 2020 and was extended until 2032, although it was initially set to end in 2024 (the "Caesar Act").

This law has contributed to limiting economic and trade relations between Jordan and Syria, in addition to increasing the costs of business operations, both directly and indirectly. After these sanctions targeted the Syrian Central Bank, it resulted in a reduction in trade financing between the two countries, and even restricted banking transactions related to it.



Jordan has worked hard to mitigate the effects of the law, seeking temporary exemptions and facilities. A noticeable improvement in Jordanian exports to Syria was observed in the first seven months of 2023, following the temporary suspension of some of the provisions of the law after the earthquake that struck Syria at the beginning of 2023.

In conclusion, it can be said that **the “Caesar Act” has disrupted economic and trade ties between Jordan and Syria and has harmed key sectors, such as agriculture and industry**, among others. With the continuation of the sanctions, Jordan faces growing challenges in strengthening and developing economic and trade relations with its sister country, Syria. Therefore, **efforts should be focused on the cancellation of the law to move forward in enhancing trade cooperation between the two countries.**

## 5. Jordan's Potential in the Reconstruction of Syria

Estimates from Fitch Solutions, a subsidiary of Fitch Ratings, suggest that **the cost of rebuilding Syria could exceed \$300 billion**. Given current circumstances, it is expected that any reconstruction efforts will play a key role in shaping Syria's economic and political stability. **This underscores the need to lift all the restrictions and sanctions imposed on the Syrian economy, including the Caesar Act.**

In this context, countries around the world and in the region, including Jordan, could play a vital role in participating in the reconstruction of the Syrian economy. This is due to the geographic proximity between Jordan and Syria, as well as **Jordan's exceptional capabilities in many sectors that support the reconstruction process**. These include the industrial sector (construction and engineering industries), real estate sector, logistics and consulting services sector, information and communications technology sector, as well as the financial services and energy sectors.

In this context, the Jordan Strategy Forum provides a **summary of the promising Jordanian economic sectors with exceptional production capabilities that could play a significant role in assisting with the reconstruction process in Syria:**

### Industrial Sector (Construction and Engineering Industries):

- **Jordan possesses advanced manufacturing capabilities in the construction and engineering industries**, including cement, steel and its products, insulation materials and paints, electrical cables, and others. The table below presents the potential of these sectors in terms of existing production volume and their export value.

Industry	Value of Production 2022 (Million Dollars)	Value of Exports 2023 (Million Dollars)	Number of Jordanian Factories (Exporting Factories)
<b>Cement and its products</b>	631.7	132.1	15
<b>Iron and its products</b>	620.3	129.8	54
<b>Insulating materials and paints</b>	287.4	100.4	44
<b>Electrical cables and wires</b>	270.6	148.9	43

Source: Department of Statistics, World Trade Organization, 2024

- **The industrial sector is the largest contributor to Jordan's GDP (17.3%).**
- According to the analysis done by the Jordan Strategy Forum and based on data from the United Nations Industrial Development Organization (UNIDO), Jordan's industrial sector holds a good position within the Arab region. **It ranks second among Arab countries in terms of the value-added ratio of manufacturing industries to GDP and second in the proportion of industrial exports to total national exports.**
- **Jordan is also a leader in construction and engineering industries**, with extensive experience spanning decades. Jordanian industries are known for their high quality and compliance with global standards, enabling them to access over 60 international markets, including key markets in the United States and Asia, as per data from the World Trade Organization (WTO).
- The presence of ready-to-export Jordanian factories located in close geographic proximity to Syria is a critical factor in reducing transportation and export costs.

#### Real Estate Sector:

- The real estate services sector in Jordan is estimated to have contributed approximately \$5.6 billion to the economy in 2023, accounting for 11% of the GDP (Department of Statistics).
- The total annual exports of the real estate sector stood at around \$70 million in 2023 (World Trade Organization).
- **Jordan boasts experienced real estate companies specialized in the development of residential and commercial projects**, which can be leveraged for rebuilding Syrian cities, along with Jordanian professionals skilled in managing construction projects.
- **The real estate sector is a key complement to the engineering and construction industries**, allowing both sectors in Jordan to play a significant role in supporting and assisting Syria in its reconstruction efforts.

#### Logistics Sector (Transportation and Shipping) and Consulting Services:

- Jordan has a fleet of approximately 29,300 freight transport trucks with an average age of 19 years per truck (Transport Regulatory Authority). This makes it feasible to **collaborate and establish a joint transport line between Jordan and Syria to meet the Syrian market's demand for freight transport.**

- Jordan is home to **numerous prominent companies with extensive expertise in providing logistical, legal, economic, and financial consulting services.**
- The exports of Jordan's transport services sector amounted to approximately \$1.83 billion in 2023 (World Trade Organization).
- The added value of the freight transport and storage sector in Jordan is estimated at an average of \$1.5 billion annually (Department of Statistics).
- **Jordan is a leader in customs and clearance services**, adhering to the best global systems, standards, and specifications. These capabilities can significantly aid Syria in expediting the reactivation of its transport and customs clearance systems.

#### Information and Communications Technology Sector:

- **Jordan has a strong base of companies specialized in developing digital solutions that can be utilized for rehabilitating Syria's digital infrastructure** and automating government services, such as customs, transport, and export services, among others.
- with an estimated annual added value of \$2.1 billion (Department of Statistics / 2024), **the Information and Communications Technology (ICT) sector holds a prominent position in Jordan's economy,**
- **Jordan's ICT sector has proven its regional and global significance**, with total exports valued at approximately \$280 million annually (Economic Modernization Vision).
- **The Jordanian tech sector boasts a qualified and skilled workforce, both locally and regionally.** Notably, 27 Jordanians were ranked among the top 100 entrepreneurs in the technology field across the Middle East and North Africa (Economic Modernization Vision).

#### Financial Services Sector:

- **Jordan has a stable banking system and extensive experience in financing and financial services.** The system ranks third in the Arab world and 73rd globally (out of 183 economies) on the Financial Development Index issued by the International Monetary Fund in 2021.
- The financial services sector holds a significant position in Jordan's economy, with an estimated annual added value of \$3.7 billion (Department of Statistics, 2024).
- Jordan's financial services sector exports are valued at approximately \$140 million

annually (Economic Modernization Vision Document).

- The financial services sector has promising potential to accelerate the digitization of banking services using financial technology. This capability could assist in automating financial services and expediting Syria's digital financial transformation.

#### Energy Sector:

- **Jordan has extensive experience in renewable energy projects**, particularly solar energy. The country has met 29% of its annual energy consumption from renewable sources. The country ranks first among the Arab world for installed renewable energy capacity and third for renewable energy production (Jordanian Ministry of Energy, 2023).
- Jordan's total electricity exports amounted to approximately \$24 million in 2023 (Department of Statistics), and this figure is expected to grow in the coming years, driven by the country's expansion of renewable energy projects aimed at boosting clean energy production and exports. This development **strengthens Jordan's role as a regional provider of sustainable energy**.
- In 2023, Jordan exported around \$100 million worth of solar panels and cells, with Canada being one of the primary export markets. Additionally, about 45 Jordanian companies were active exporters of these products (Department of Statistics).
- **Jordan can significantly assist Syria in the energy and renewable energy sectors**, with potential opportunities for bilateral partnerships to enhance energy generation for both countries.

## 6. Jordan Strategy Forum Recommendations

1. Establish Partnership Agreements and Memorandum of Understandings (MOUs) to foster stronger trade and economic ties between Jordan and Syria. These should focus on Jordan's promising sectors (such as industry, energy, financial services, and real estate) which can significantly contribute to the success of Syria's reconstruction.
2. Advocate for the Repeal of the Caesar Act to lift the economic and trade sanctions on Syria. This lifting would pave the way for strengthening economic and trade relations between Jordan, Syria, and other Arab countries.
3. Reevaluate Trade Restrictions by both countries in issues like import bans, restrictions

on export-import volumes, and trade-related conditions imposed on industrialists and traders.

4. Support Syrian Customs and Transport Automation in restoring its customs system (the global ASYCUDA system) and automate transport services to streamline and expedite the movement of goods between the two nations.
5. Review Tariffs and Transit Fees. Reexamine customs duties and transit fees imposed on exports from both sides to encourage smoother trade relations.
6. Reactivate the 1999 Transport Agreement. Consider reinstating the bilateral road transport agreement for passengers and goods. This would standardize freight transportation fees (direct and transit) in both countries to a fixed rate, regardless of distance or weight, as previously practiced.
7. Lift Import Restrictions. Remove all restrictions on the imports of Jordanian goods and vice versa and eliminate any trade barriers (such as import ban lists) from both sides.
8. Reopen the Bab al-Hawa Crossing. Assist Syria in reopening the Bab al-Hawa border crossing (Syria-Turkey) and ensure the safe passage of freight trucks to promote interregional trade.

## Appendix 1: The equation used in calculating the comparative advantage index (RCA)

(For the Technical Reader):

$$RCA_i = \frac{\left\{ \frac{X_{ij}}{(\sum_i X_{ij}) - X_{ij}} \right\}}{\left\{ \frac{((\sum_j X_{ij}) - X_{ij})}{((\sum_j \sum_i X_{ij}) - (\sum_j X_{ij})) - ((\sum_i X_{ij}) - X_{ij})} \right\}}$$

The Above Variables Refer to the Following:

$X_{ij}$  : The export value of sector i from country j.

$\sum_i X_{ij}$  : The total exports of country j across all goods.

$\sum_j X_{ij}$  : The total global exports of sector i.

$\sum_j \sum_i X_{ij}$  : The total global exports across all goods.

**Example to Illustrate and Understand the Relative Competitive Advantage (RCA) Index:**

**Product: Nitrogenous Fertilizers (HS Code: 3102)**

Given the following data:

Jordan's exports of product 3102 = \$394.2 million

Total Jordanian exports = \$11,629 million

Global exports of product 3102 = \$39,419 million

Total global exports = \$23,967,553 million

**The Value of the Relative Competitive Advantage (RCA) Index for Jordan in Nitrogenous Fertilizers (HS Code: 3102) = 17.97**



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