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Report Name: Grain and Feed Update

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Prepared By: Mohannad Al Shahwan

Approved By: Adam Klein

Report Highlights:

Jordan remains heavily dependent on grain imports due to limited arable land and chronic water scarcity. The 2024/25 rainy season was among the weakest in decades, capping several consecutive years of below-average rainfall. As a result, Jordan's wheat and barley production is limited, and the country imports more than 95 percent of its wheat and barley needs. Wheat consumption continues to grow with population increases, supported by substantial government subsidies and strategic reserves covering eight months of demand. Wheat imports are forecast at 1.15 MMT. Barley— subsidized for livestock producers—will require 900,000 MT of imports, with ending stocks rising to 332,000 MT. Corn imports, managed by the private sector, remain steady at 750,000 MT. Rice imports are forecast at 275,000 MT, with seasonal increases ahead of Ramadan. Jordan continues diversifying its supply sources under its National Food Security Strategy.

Disclaimer: Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service in Jordan and is not official USDA data.

Executive Summary:

Jordan remains highly dependent on grain imports to meet domestic food and feed needs due to limited arable land, chronic water scarcity, and repeated years of below-average rainfall. The 2024/25 rainy season was one of the weakest in decades, sharply reducing soil moisture and constraining yield potential for both wheat and barley. As a result, marketing year (MY) 2025/26 (July – June) wheat and barley production forecasts remain unchanged at longstanding levels—30,000 metric tons (MT) and 25,000 MT, respectively. Jordan typically imports more than 95 percent of its wheat and barley needs.[1]

Wheat consumption continues to rise gradually, supported by 2.3 percent average population growth[2] and the Government of Jordan's (GoJ's) continued efforts to stabilize bread prices via wheat subsidies valued at JD139 million wheat ($196 million) in 2025 and JD109 million ($154 million) in 2026, while the GoJ maintains substantial strategic wheat reserves covering roughly eight months of national demand. Wheat imports in MY 2025/26 are forecast at 1.15 MMT, in line with the official USDA estimate, with Romania and Russia remaining the dominant suppliers.

Barley remains a fully subsidized strategic feed grain essential to the livestock sector. MY 2025/26 barley imports are forecast at 900,000 MT, in line with the official USDA estimate, and ending stocks are projected to increase to 332,000 MT as the GoJ reinforces strategic holdings to maintain at least eight months of supply.

Corn imports are managed entirely by the private sector. MY 2025/26 (October – September) corn imports are forecast at 750,000 MT, stable year-on-year, as demand from the poultry and livestock sectors remain steady. U.S. corn remains generally uncompetitive on price, due to unfavorable freight rates; however, there were brief periods over the summer when it became more price competitive with corn from South America, particularly Brazil and Argentina.

Rice consumption and imports remain stable but are expected to increase seasonally in December and January ahead of Ramadan, when daily iftar meals and frequent family gatherings drive peak rice consumption. Total MY 2025/26 (January – December) rice imports are forecast at 275,000 MT, in line with the official USDA estimate.

Across all commodities, Jordan maintains a diversified sourcing strategy as part of its National Food Security Strategy (2021-2030) and continues to prioritize food security through a combination of government tenders (wheat and barley), private sector imports (corn and rice), and sustained strategic reserves.

[1] The National Food Security Strategy (2021-2030)
[2] https://www.worldeconomics.com/Processors/Demographics-Countries-PopulationGrowthRates.aspx?Country=Jordan

Wheat

Table 1 - Production, Supply and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Jordan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	30	30	30	30	30	30
Beginning Stocks (1000 MT)	620	620	757	740	827	790
Production (1000 MT)	30	30	30	30	30	30
MY Imports (1000 MT)	1138	1121	1111	1091	1150	1150
TY Imports (1000 MT)	1138	1121	1111	1091	1150	1150
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1788	1771	1898	1861	2007	1970
MY Exports (1000 MT)	36	36	36	36	50	50
TY Exports (1000 MT)	36	36	36	36	50	50
Feed and Residual (1000 MT)	15	15	15	15	15	15
FSI Consumption (1000 MT)	980	980	1020	1020	1050	1050
Total Consumption (1000 MT)	995	995	1035	1035	1065	1065
Ending Stocks (1000 MT)	757	740	827	790	892	855
Total Distribution (1000 MT)	1788	1771	1898	1861	2007	1970
Yield (MT/HA)	1	1	1	1	1	1

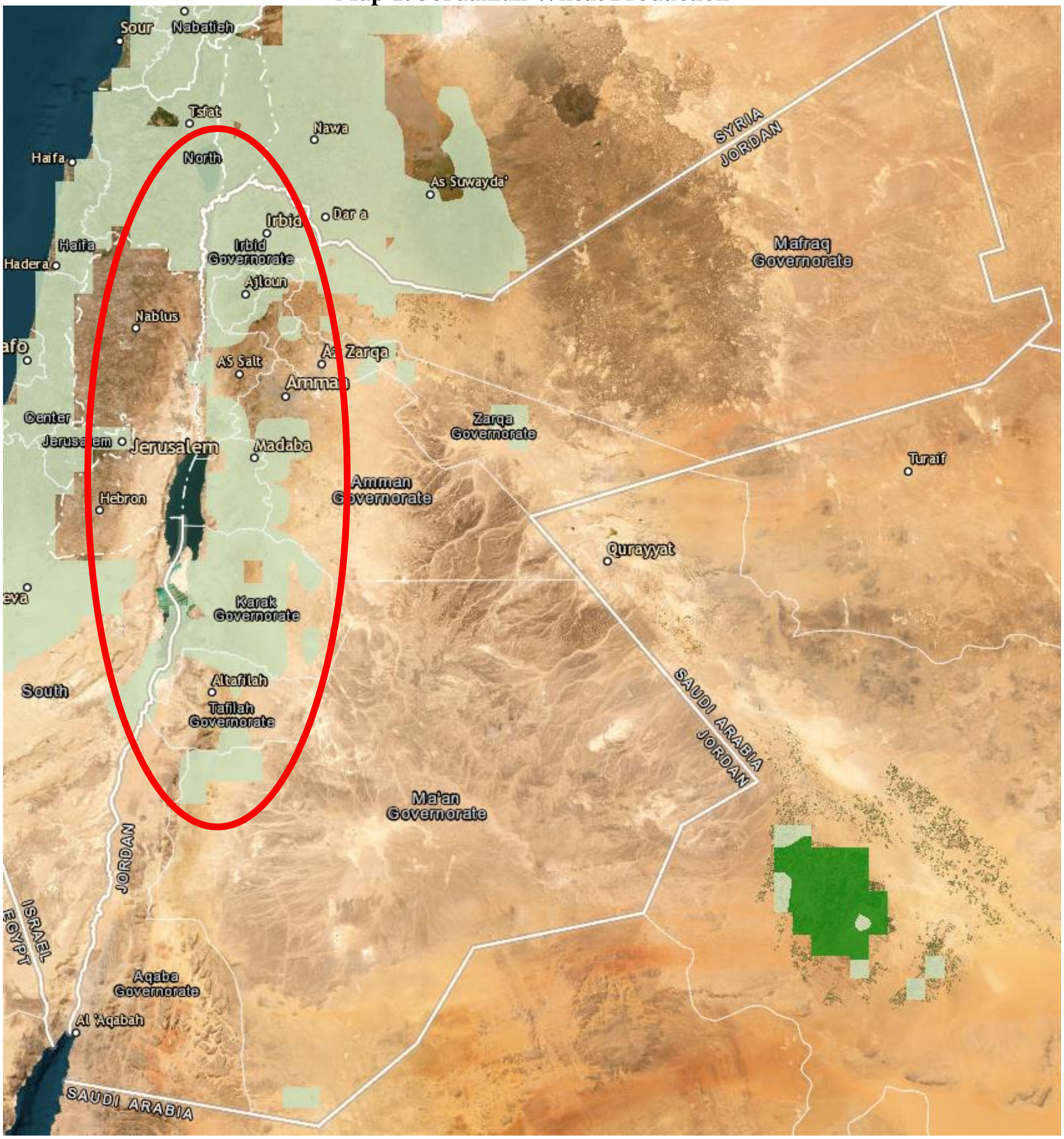
(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Production
In marketing year (MY) 2025/26, FAS Amman forecasts Jordan's harvested area remaining at 30,000 hectares, with no change in yield projections, resulting in production of 30,000 metric tons (MT), in line with historical averages. An arid country, Jordan's wheat production remains limited and highly dependent on rainfall in its northwest rain-fed areas.

Wheat crop conditions reflect the impact of multiple years of below-average precipitation and deteriorating soil moisture in key growing regions. The 2024/25 rainy season was among the weakest in decades, delivering only 46–68 percent of average precipitation in major wheat zones. Persistent high-pressure systems and Siberian cold waves produced cold but mostly dry winter conditions, preventing proper soil moisture recharge and contributing to frost injury during early development. USDA Crop Explorer's satellite NDVI and WMO soil-moisture monitoring support sparse vegetation and dry-soil profiles, limiting the potential for increases in yield.

Map 1: Jordanian Wheat Production



Source: USDA Crop Explorer

The bulk of Jordan's wheat production occurs in the northern and western part of the country, spanning the governorates of Irbid, Amman, Karak, Tafilah, and Ma'an. Locally produced wheat is sold to the Ministry of Industry, Trade, and Supply (MOITS), the Jordanian authority responsible for regulating and monitoring internal and external trade, which sells it to mills (for more information on MOITS's role in wheat trade, see Trade section below).

Consumption

FAS Amman anticipates that consumption of wheat products in Jordan will rise to 1.065 million metric tons (MMT) of wheat grain equivalent (WGE), marking a 2.8 percent increase from MY 2024/25, due to population growth and the Government of Jordan's (GoJ's) continued efforts to stabilize bread prices via wheat subsidies.[3] MY 2025/26 food, seed, and industrial use (FSI) is forecast at 1.05 MMT WGE, in line with the USDA official figure and up nearly 2 percent from MY 2024/25. Bread is a staple in terms of daily food intake, as it holds significant cultural and dietary importance. The Government of Jordan (GoJ) estimates annual per capita bread consumption at 90 kg.[4] Feed use remains low at 15,000 MT, as wheat remains more expensive than barley and imported feed grains.

Trade

Jordan remains a major wheat importer, relying on regular state-issued tenders to procure high-protein milling wheat for subsidized flour supply chains. FAS Amman forecasts MY 2025/26 imports at 1.15 MMT WGE, as authorities seek to maintain wheat reserves in line with the GoJ National Food Security Strategy and amid continued regional uncertainty. Romania and Russia remain Jordan's primary suppliers, while Ukraine, Bulgaria, and Serbia participate in government tenders when market dynamics make them competitive and supply is available. FAS Amman projects no U.S. wheat imports due to price sensitivity and strong competition from Black Sea suppliers.

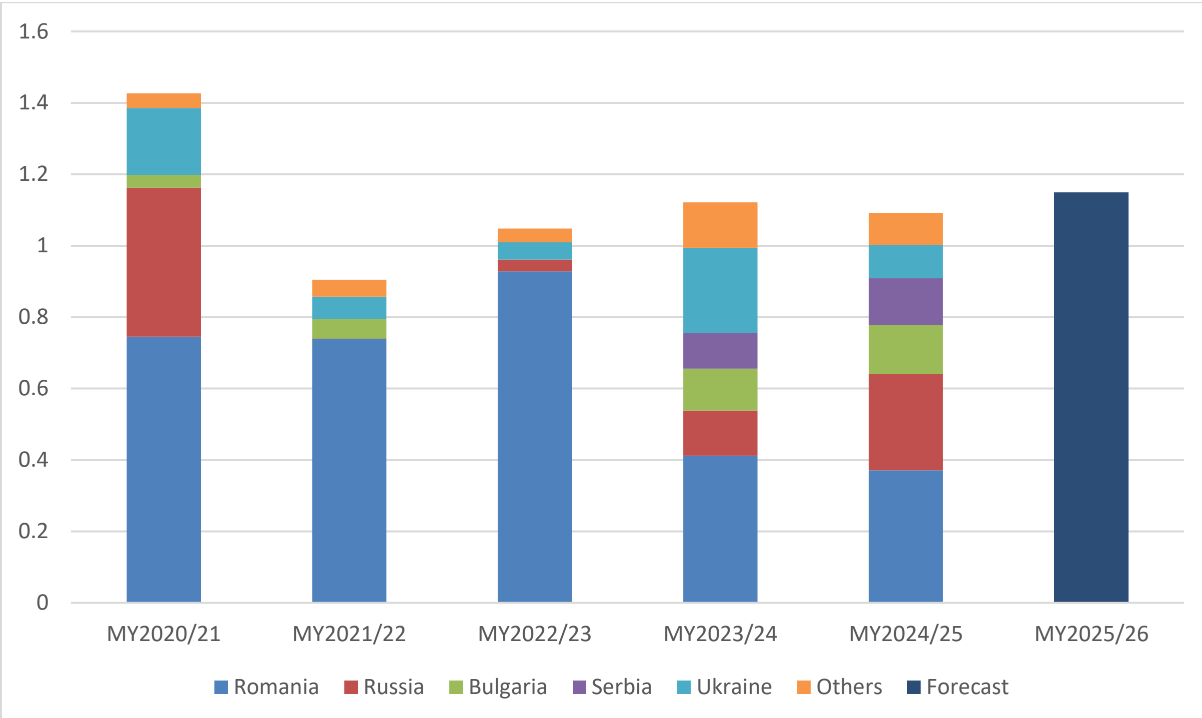
To mitigate supply uncertainty and address Red Sea shipping challenges—such as delays, longer transit times, and higher freight costs—Jordan is diversifying its supply origins. The GoJ actively procures large quantities of grain through international tenders, issuing a monthly wheat tender for 120,000 MT, open to all traders and participants; typically the GoJ places orders when prices are lower (for additional information about GoJ tenders, see Wheat and Barley Opportunities in Jordan (GAIN JO2025-0011)). The Jordanian milling industry relies on its wheat supply from MOITS. The milling industry distributes the flour directly to the end customer.

Based on the latest trade data, FAS Amman revised Jordan's MY 2023/24 wheat import estimates downward to 1.121 MMT and MY 2024/25 wheat import estimates downward to 1.091 MMT.

[3] Gov't allocates JD139 million for wheat subsidies in 2025 – ministry

[4] Roya News - Bread Consumption Estimate

Figure 1: Volume of Jordanian Wheat Imports by Country of Origin, MMT, WGE



Source: Trade Data Monitor

Jordan normally re-exports or transships small quantities of wheat to neighboring markets; MY 2025/26 exports are forecast at 50,000 MT.

Stocks

Jordan maintains significant strategic wheat reserves as part of its food security framework. MY 2025/26 ending stocks are forecast at 855,000 MT, equal to roughly eight months of consumption coverage. The GoJ has publicly committed to maintaining its strategic wheat reserves through continued diversification of suppliers and expanded storage capacity; in June, MOITS stated that construction of new grain storage facilities in Qatraneh will allow Jordan to maintain wheat reserves up to approximately 16 months of wheat consumption.[5]

Policy

There have been no changes to Jordan's bread subsidy program. The GoJ continues to partially subsidize wheat flour used in staple breads, ensuring price stability for consumers despite high import reliance. Current regulated consumer prices are:

- JD 0.40/kg (USD 0.56) – Small pita bread
- JD 0.32/kg (USD 0.45) – Large pita bread
- JD 0.35/kg (USD 0.45) – Arabic bread (Mashrouh)

The bread subsidy remains a central food security and social-stability measure, particularly for lower-income households and refugee populations.

[5] Kingdom's stock of wheat covers 10 months – Ministry of Industry

Barley

Table 2 - Production, Supply and Distribution

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Jordan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	25	25	25	25	25	25
Beginning Stocks (1000 MT)	296	296	284	284	307	307
Production (1000 MT)	25	25	25	25	25	25
MY Imports (1000 MT)	863	863	898	898	900	900
TY Imports (1000 MT)	847	847	850	850	800	800
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1184	1184	1207	1207	1232	1232
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	900	900	900	900	1100	900
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	900	900	900	900	1100	900
Ending Stocks (1000 MT)	284	284	307	307	132	332
Total Distribution (1000 MT)	1184	1184	1207	1207	1232	1232
Yield (MT/HA)	1	1	1	1	1	1

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

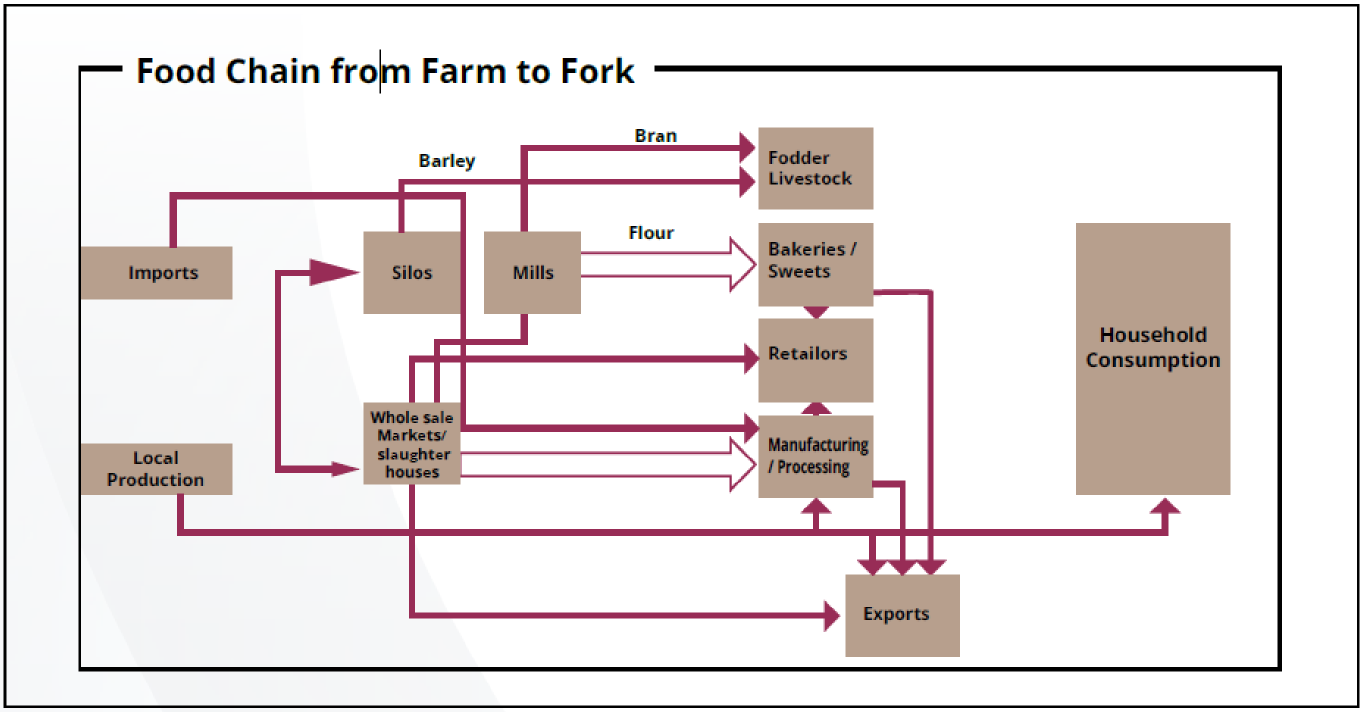
Production

Barley production in Jordan remains structurally low and highly dependent on rainfall in marginal northern and eastern regions. For MY 2025/26, harvested area remains at 25,000 hectares and yields at 1.0 MT per hectare, with production steady at 25,000 MT — unchanged year-on-year due to continued soil moisture deficits following the extremely weak 2024/25 rainy season. Domestic output meets only a small share of Jordan's livestock feed requirements.

Consumption

Barley remains a strategic feed grain in Jordan, primarily supporting the sheep and goat livestock sectors that are central to rural livelihoods and income in the Badia region.[6] Feed and residual use accounts for 100 percent of barley consumption, as barley is not used for food processing in Jordan.

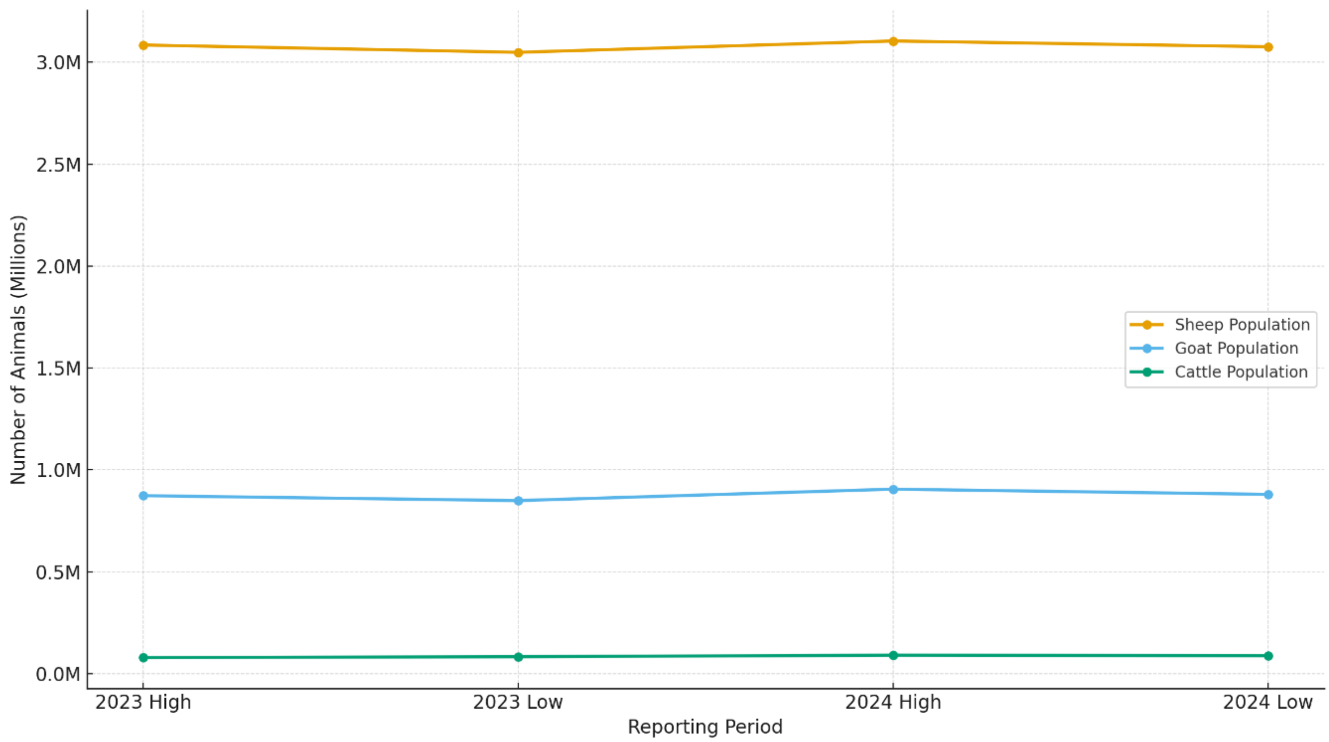
[6] Jordan's vast desert region that is historically home to Bedouin herders that rely on livestock.



Source: Jordan's National Food Security Strategy (2021-2030)

Annual barley demand is closely tied to livestock population trends and grazing conditions. During drought years — such as the extremely weak 2024/25 rainy season — pressure on rangelands increases significantly, requiring greater reliance on subsidized barley distribution. Jordan's Ministry of Agriculture and the Livestock Support Program regulate barley sales to herders at controlled prices, with quantities allocated based on registered herd size to prevent leakage into the commercial market (for additional information, see the Policy section below).

Figure 2: Jordan Livestock Population Comparison (Sheep, Goats, Cattle), 2023–2024[7]



Source: Jordan Department of Statistics

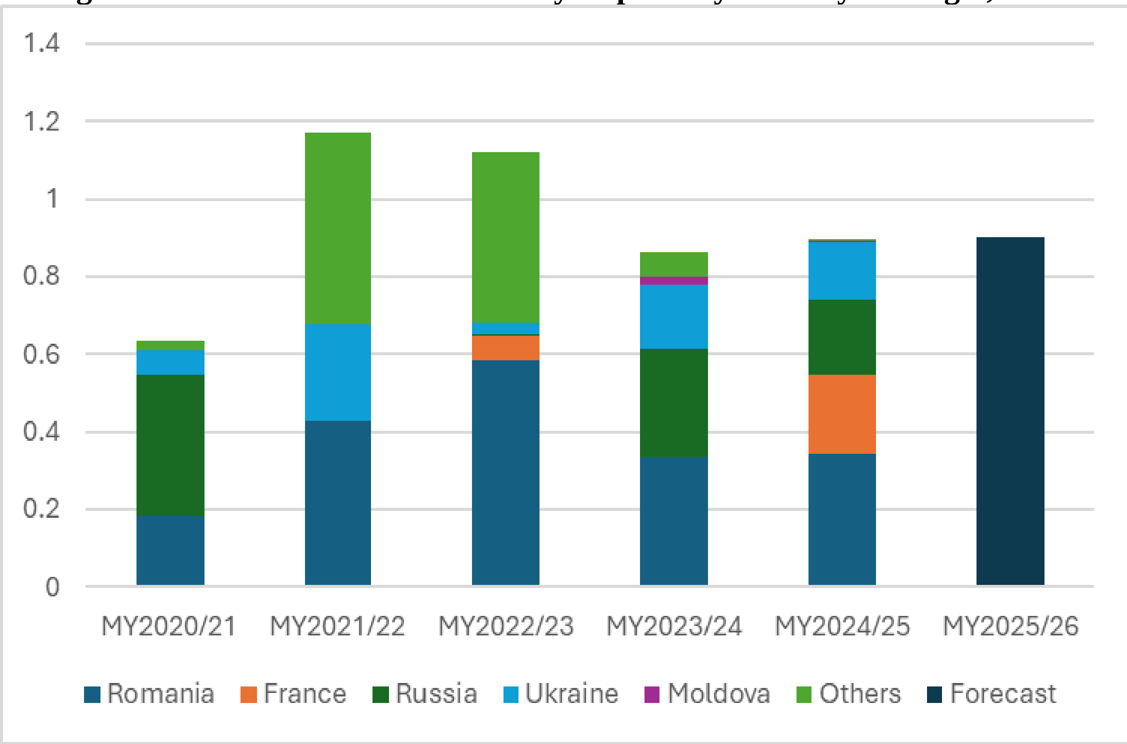
FAS Amman forecasts MY 2025/26 feed use steady at 900,000 MT, unchanged from MY 2024/25. While livestock numbers remain stable, subsidy allocation limits and constrained government budgets have also capped demand growth. Additionally, some substitution toward imported mixed feed products has occurred in recent years, particularly near urban centers where commercial operations are expanding.

Trade

Jordan remains highly dependent on imports for its barley needs, and FAS Amman forecasts MY 2025/26 barley imports at 900,000 MT, consistent with MY 2024/25. Procurement is carried out primarily through public tenders aimed at maintaining affordability and supply security for livestock producers. Black Sea and European Union providers continue to dominate the market — primarily Romania, Russia, Ukraine, France, and Moldova — based on competitive pricing and freight advantages. No imports from the United States are expected.

[7] http://dos.gov.jo/owa-user/owa/FOCAL_AGR_anm.show_param?LANG=E&dis=2

Figure 3: Volume of Jordanian Barley Imports by Country of Origin, MMT



Source: Trade Data Monitor

Stocks

FAS Amman forecasts MY 2025/26 ending stocks at 332,000 MT, reflecting the GoJ's commitment to maintaining strategic reserves. Barley is considered a critical food security commodity for the livestock sector, and the government aims to preserve at least eight months of supply coverage to support market stability and cushion against feed price volatility.

Policy

The GoJ continues to heavily subsidize barley to stabilize feed costs for livestock producers, allocating JD71 million ($100 million) in 2025 to support barley and bran prices. This subsidy is a core component of Jordan's food-security strategy, ensuring affordability for herders and safeguarding the livestock sector amid volatile global feed markets.[8] Support is particularly critical for small and medium flock holders during feed-deficit periods when forage production declines sharply. The subsidy helps producers manage high feed import dependence and volatile global grain prices.

[8] 180 Million to Support Wheat and Barley and Stabilize Bread Prices for Next Year

Corn

Table 3 - Production, Supply and Distribution

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Jordan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1	1	1	1	1	1
Beginning Stocks (1000 MT)	29	29	23	23	19	19
Production (1000 MT)	10	10	11	11	11	11
MY Imports (1000 MT)	809	809	750	750	750	750
TY Imports (1000 MT)	809	809	750	750	750	750
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	848	848	784	784	780	780
MY Exports (1000 MT)	5	5	5	5	5	5
TY Exports (1000 MT)	5	5	5	5	5	5
Feed and Residual (1000 MT)	810	810	750	750	750	750
FSI Consumption (1000 MT)	10	10	10	10	10	10
Total Consumption (1000 MT)	820	820	760	760	760	760
Ending Stocks (1000 MT)	23	23	19	19	15	15
Total Distribution (1000 MT)	848	848	784	784	780	780
Yield (MT/HA)	10	10	11	11	11	11

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Production
Corn production in Jordan remains very limited due to land and water constraints. For MY 2025/26, the harvested area is unchanged at 1,000 hectares, with production forecast at 11,000 MT – consistent with the previous year. Domestic production meets only a small fraction of national demand, and the sector does not play a significant role in reducing Jordan's reliance on imports.

Consumption
FAS Amman forecasts Jordan's corn consumption in MY 2025/26 at 760,000 MT, unchanged from MY 2024/25. Demand is driven almost entirely by the livestock and poultry feed sectors. The feed market remains steady, with no major expansions in poultry or dairy capacity expected in the short term. Food, seed, and industrial (FSI) use remains minimal at 10,000 MT, reflecting stable consumption patterns and limited corn use in food manufacturing and processing.

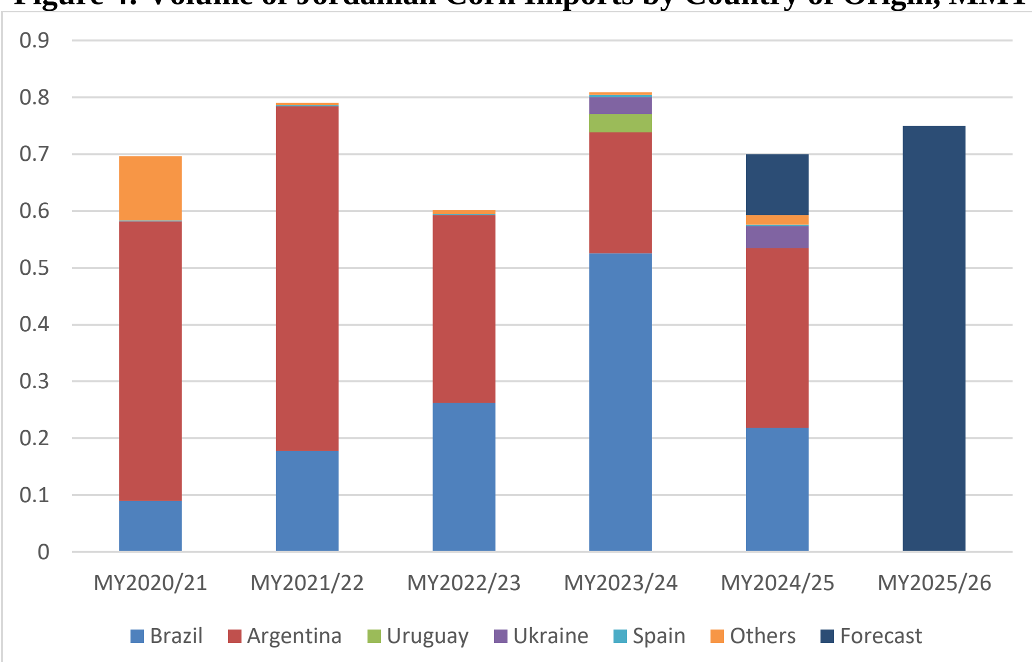
Corn continues to serve as a core ingredient in commercial feed rations, particularly for poultry, which remains an important source of protein in Jordan. Consumption patterns remain stable due to resilient demand for poultry products and structured feed programs managed by major private-sector integrators.

Trade

Corn imports remain fully managed by the private sector, unlike wheat and barley, where the GoJ directly procures strategic stocks. Private feed companies and traders determine import volumes, contract origins, manage storage, and distribute product based on market demand and price movements.

FAS Amman forecasts MY 2025/26 corn imports at 750,000 MT, unchanged from MY 2024/25. Jordan's main suppliers continue to be Brazil, Argentina, and Ukraine, with periodic shipments from other Black Sea origins depending on price competitiveness and freight conditions.
While the United States has not shipped corn to Jordan in recent years, U.S. FOB Gulf corn has become increasingly price-competitive, narrowing the gap with Brazil and Argentina. Continued convergence in U.S. pricing—combined with freight market shifts—could improve competitiveness, although FAS Amman forecasts no U.S. imports in the current marketing year.

Figure 4: Volume of Jordanian Corn Imports by Country of Origin, MMT



Source: Trade Data Monitor

Exports
Jordan exports only small quantities of corn, largely re-exports or transshipments. MY 2025/26 exports remain at 5,000 MT, consistent with historical patterns.

Stocks
Beginning stocks for MY 2025/26 stand at 19,000 MT, with ending stocks forecast at 15,000 MT, reflecting normal stock rotation practices within the private sector. Traders typically maintain moderate inventories to mitigate supply disruptions and ensure steady availability for the feed industry. The GoJ does not maintain strategic reserves of corn.

Rice

Table 4 - Production, Supply and Distribution

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Jordan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	10	10	34	34	39	39
Milled Production (1000 MT)	0	0	0	0	0	0
Rough Production (1000 MT)	0	0	0	0	0	0
Milling Rate (.9999) (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	274	274	275	275	275	275
TY Imports (1000 MT)	274	274	275	275	275	275
TY Imp. from U.S. (1000 MT)	69	69	0	70	0	70
Total Supply (1000 MT)	284	284	309	309	314	314
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	250	250	270	270	280	280
Ending Stocks (1000 MT)	34	34	39	39	34	34
Total Distribution (1000 MT)	284	284	309	309	314	314
Yield (Rough) (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production
Jordan does not produce rice due to its arid climate, limited arable land, and severe water scarcity. Rice is a highly water-intensive crop, and domestic cultivation is not feasible under Jordan's environmental conditions. As a result, the country is fully dependent on imports to meet all domestic rice needs.

Consumption
Rice is a core staple food in Jordan, consumed daily by most households and serving as the foundation for iconic dishes such as Mansaf and Maqlouba. MY 2025/26 consumption is forecast at 280,000 MT, slightly higher than the previous year, reflecting steady population growth and consistent dietary preferences.

Importers and retailers typically increase purchases during December and January to prepare for Ramadan, which begins in February 2026. Rice consumption peaks during Ramadan, as families prepare rice-based meals for daily iftar and suhoor, and households often host extended family gatherings. This recurring seasonal demand leads to higher short-term imports and increased market activity ahead of Ramadan.

Jordanian consumers traditionally prefer medium-grain rice, but demand for long-grain rice continues to grow because it is easier to cook and offers more consistent results. Many households now blend both types to balance texture, price, and convenience.

In the past few years, Jordan's food service and tourism sectors – which have historically been vital components of the country's economy – have faced significant challenges due to geopolitical tensions in the region, resulting in fewer tourists sampling traditional Jordanian dishes (for additional information about Jordan's food service and tourism industries, see Jordan's Exporter Guide Annual (GAIN JO2025-0004)).

Trade

Jordan will remain fully dependent on rice imports in MY 2025/26, with total imports forecast at 275,000 MT, unchanged from the previous year. The United States is expected to supply approximately 70,000 MT, maintaining its strong position in the medium-grain segment, while India continues to dominate the long-grain market due to newly introduced dishes from the Gulf region like Kabsa and Mandi. Jordan will continue sourcing from a diversified supplier base to ensure market stability and meet rising seasonal demand, particularly ahead of Ramadan.

FAS Amman forecasts no rice exports in MY 2025/26. In December 2023, the MOITS restricted exports of essential food items, including rice, in order to stabilize domestic supply and prevent price spikes. Any outbound shipments require special government approval and are extremely limited.

Stocks

Beginning stocks for MY 2025/26 are 39,000 MT, with ending stocks projected at 34,000 MT. Although rice is handled almost entirely by private traders, the GoJ actively encourages larger buffer stocks to enhance food security and to ensure sufficient supply ahead of Ramadan and during potential global market disruptions.

Marketing

Rice imports are managed by the private sector, which handles procurement, repackaging, storage, and distribution to retailers. Major supermarket chains and wholesalers, and military consumer markets (or co-ops) ensure wide availability across the country, and rice remains one of the most accessible staples in Jordan's food market.

Policy

MOITS continues to monitor the rice market closely and maintains export restrictions on essential foodstuffs, including rice, to ensure domestic availability and price stability. Despite these controls, the GoJ has facilitated humanitarian shipments to Gaza that move through the Jordan Corridor but are not reflected in official export figures.

Attachments:

No Attachments