Advancing IMEC Toward Implementation

Jordan River Crossing Study

Demand Analysis | Capacity Assessment | Expansion Guidelines

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Konrad-Adenauer-Stiftung Israel

Active in Israel since 1982, the Konrad-Adenauer-Stiftung (KAS) in cooperation with local partner organizations is striving to preserve and deepen the relationship between Germany and Israel and between Israel and the EU. Together with its Israeli partners it promotes democratic resilience and strengthens liberal democracy. The KAS is moreover implementing regional dialogue formats to foster a peaceful coexistence between Israel and its neighbors while also taking into account regional power shifts and external threats.

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Preface and Acknowledgements

The India-Middle East-Europe Economic Corridor (IMEC) represents a transformative shift in regional and global connectivity, offering a historic opportunity to reshape the geopolitical and economic landscape of the Levant. By bridging India, the Persian Gulf, Israel, and Europe, IMEC serves as a catalyst for regional stabilization and deep integration.

For Israel and Jordan, it provides a vital platform to enhance the 1994 peace treaty by fostering shared economic spaces, while offering the region a concrete mechanism to reinforce the Abraham Accords through high-impact, joint infrastructure initiatives.

However, the significance of IMEC extends far beyond regional welfare. As demonstrated at the 2023 G20 Summit in New Delhi, the corridor has garnered the commitment of the United States, the European Commission, and major European powers, including Germany. For Germany—the European Union's primary economy—IMEC is a strategic necessity. Recent years have highlighted the complexities and vulnerabilities associated with economic and geopolitical interdependencies; reliance on Russian energy or single markets for exports created significant vulnerabilities. Furthermore, global disruptions have underscored the fragility of supply chains when alternative routes are often limited or blocked. By promoting IMEC, Germany and its partners seek to diversify global logistics, ensuring resilient access to Asian markets while fostering stability in the Middle East.

In light of these shared priorities, the Konrad Adenauer Stiftung (KAS) in Israel is pleased to present this implementation study, which addresses one of the most critical physical bottlenecks of this vision: the Jordan River Crossing (Sheikh Hussein Crossing). While the potential for wealth generation and peace is vast, the window of opportunity is narrowing. Alternative routes bypassing Israel through Central Asia, or linking Syria and Turkey with the Gulf, are already emerging. For the IMEC vision to become a reality, Israel, together with its partners, must demonstrate decisive political willingness and a readiness for deep cooperation. This analysis provides the technical and strategic roadmap necessary to upgrade the crossing realize the corridor's full potential, with a focus on the Israeli and Jordanian framework in this context.

We would like to express our deepest gratitude to the partners and colleagues who made this study possible. We begin by thanking lead author Yitzhak Gal for his diligent work in advancing this implementation study. We are equally grateful to our partners from the Jordanian Amman Center for Peace and Development (ACPD), whose analysis of the current situation and insights into solutions form the core of our guidelines, and to ISPAL JO – Middle East Trade Connections Ltd, whose expertise and experience are reflected throughout this analysis. This study would not have happened without the important initiative and insights of the Institute for Maritime Policy & Strategy (MPS), and contributions from experts in the field. Finally, we express our appreciation to the Israeli Federation of Chambers of Commerce for their valuable support and insights.

We trust that this paper, as part of our continued joint efforts in this field, will serve as a valuable resource for policymakers, stakeholders, and researchers working to advance practical regional cooperation and strengthen relations between Israel and Jordan. While heightened geopolitical tensions have complicated progress, the imperative of advancing stability and prosperity is greater than ever. By addressing key practical connectivity challenges today, we aim to help lay the groundwork for a future grounded in shared innovation and enduring stability.

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Executive Summary

The limited capacity of the Jordan River Crossing between Israel and Jordan represents the most significant bottleneck hindering the immediate advancement of the IMEC route. In the short term, advancing the IMEC initiative can be achieved by addressing this critical bottleneck. [1]

The analysis presented in the study indicates that current demand at the Jordan River Crossing is approximately 1,500 trucks per workday—around 1,000 trucks per day for transit shipments via Israel and roughly 500 trucks per day for direct Israeli exports and imports—compared to an effective total capacity of just 200 trucks per day. [2]

If political stability is achieved (hopefully following successful implementation and the Trump plan for resolving the Gaza conflict), demand is projected to gradually increase to approximately 7,500 trucks per day within three years. That demand is expected to be composed of 6,500 trucks per day transit shipments via Israel, and 1,000 trucks per day direct Israeli export and import shipments. [3]

The Jordan River Crossing's extremely low capacity relative to demand is due to its original design, which prioritized passenger traffic rather than serving as a major gateway for international trade. Its cargo terminal was built with limited capacity.

Therefore, a paradigm shift is required. The Jordan River Crossing should be re-defined as a large international inland port, and its physical design, operational guidelines, and other aspects of its operation should be adapted accordingly.

Based on a detailed analysis of present constraints, the study suggests guidelines for expansion of the capacity of the Jordan River Crossing. These guidelines relate to the development of required handling capacity, logistical and other specialized facilities, as well as new arrangements for transit trade.

The objective of the expansion plan is a phased increase in capacity: Phase One – Achieve a stable operational capacity of 1,500 trucks per day within 12 months, and Phase Two – gradual increase of capacity to 7,500 truckloads per day within three years.

The present cargo terminal will be designated for handling "non-transit" cargo only. [4] Its capacity will be expanded to 500 trucks per day in Phase One, and 1,500 trucks per day in Phase Two.

The most appropriate location for a separate fast-track transit terminal is the Jordan Gateway Industrial Park. This is a joint Jordanian – Israeli estate of slightly less than 1,000 dunam, [5] located 9 km south of the Jordan River Crossing. The proposed "Jordan Gateway Transit terminal" will be designed as an inter-modal land port. It will be integrated with the wider system of the Jordan

1 There are several other logistical and political bottlenecks (for example, Saudi refusal to allow shipments carrying Israeli documents to pass via Saudi Arabia). However, the limited capacity of the Jordan River Crossing is the primary and most impactful constraint.

2 As detailed in Annex A, the study uses the following terms for measurement of shipments: "TEU" (Twenty-foot Equivalent Unit, which is the standard unit used in shipping statistics and analyses), TEU = 20-foot container or its equivalent; "truck" = truckload, usually carrying a 40-foot container or its equivalent. Almost all shipments are 40-foot containers or their equivalent; therefore, the number of trucks is almost half that of TEUs (see Table 2 and Table 4 below, as well as different tables in Annex A).

3 This volume is substantial when compared to the current number of containers passing through Israeli ports. However, given the huge volume of regional trade and international West – East trade, these estimates represent a very small share of relevant trade. The analysis below indicates that the total volume of product groups for which the IMEC route offers a clear incentive to shift shipments exceeds one-third of all relevant East–West trade between the countries along the IMEC route. In contrast, our estimate for IMEC route usage after three years—assuming continued political stability—is only 3% to 4% of relevant trade.

4 Namely, direct Israeli exports and imports.

5 1 dunam = 1,000 square meters

River Crossing, connected to the Haifa–Beit Shean railway line, and will operate in close coordination with the Israeli Mediterranean Sea ports in the area of Haifa (the Port of Haifa, the Haifa Bay Port and the Israel Shipyards Port).

Since the infrastructure of the Jordan Gateway facility is already in place, it can begin operations on a small scale almost immediately once a joint Jordanian–Israeli decision is made to use it as a transit terminal. The Jordan Gateway transit terminal will be designed to support traffic of 1,000 trucks per day in Phase One (12 months from start), and then gradually expand to 6,000 trucks per day, within three years (Phase Two).

A core guideline of the new master plan for the expansion of the crossing is to treat it as a large inland port. This means multiple tracks and parallel processing lanes, as well as fully coordinated operation on both sides of the crossing, and use of unified control and operation systems.

By completion of Phase Two, the Jordan River Crossing is expected to become a large inland port, at par with world-class international inland ports, such as the US inland ports of Laredo on the border with Mexico and Detroit–Windsor on the Canadian border (Over 15,000 and 10,000 incoming trucks per day, respectively). [6]

This will be achieved by a set of infrastructural, process-related and governance-and-performance-related steps, as per the guidelines detailed in this study. The master plan for Phases One and Two should also account for long-term plans to establish a continuous railway connection along the entire overland segment of the IMEC route.

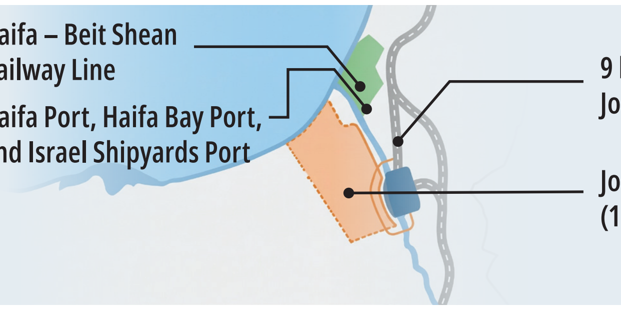
6 US Department of Transportation, Bureau of Transportation Statistics, border crossing Data 2023–2025 (February 2025)

Infographic

EXECUTIVE SUMMARY: UNLOCKING THE IMEC ROUTE — THE EXPANSION PLAN & FUTURE VISION

THE JORDAN GATEWAY TRANSIT TERMINAL

Proposed location for fast-track transit terminal



Schematic (not to scale)

IMPLEMENTAITON: PHASED CAPACITY INCREASE

PHASE ONE (IMMEDIATE): EXPANSION (12 MONTHS)

- **Jordan Gateway Transit Terminal:** target 1,000 trucks/day
  – Can begin quickly (infrastructure in place)
- **Present Cargo Terminal (non-transit only):** target 500 trucks/day

PHASE TWO (GRADUAL): GROWTH (3 YEARS)

- **Jordan Gateway Transit Terminal:** target 6,000 trucks/day
- **Present Cargo Terminal:** target 1,500 trucks/day

A CORE GUIDELINE: TREAT AS A LARGE INLAND PORT

Fully coordinated Operation on Both Sides of the Crossing

THE FUTURE VISION: A WORLD-CLASS INLAND PORT

Laredo (US-Mexico)

15,000+ Incoming trucks/day

Jordan River Crossing scaled toward world-class inland-port operations

Long-term plan: Continuous Railway Connection Across IMEC Route

Detroit-Windsor (US-Canada)

10,000+ Incoming trucks/day

UNLOCKING THE IMEC ROUTE
— THE JORDAN RIVER CROSSING BOTTLENECK & PARADIGM SHIFT

THE CURRENT BOTTLENECK

Jordan River Crossing

Demand: **≈1,500 trucks/day**

Transit via Israel (≈1,000 trucks/day)

Direct Israeli import/export (≈500 trucks/day)

Capacity (current): ≈200 trucks/day

FUTURE DEMAND PROJECTION

Assuming political stability

Demand to Rise: ~7,500 trucks/day in 3 Years

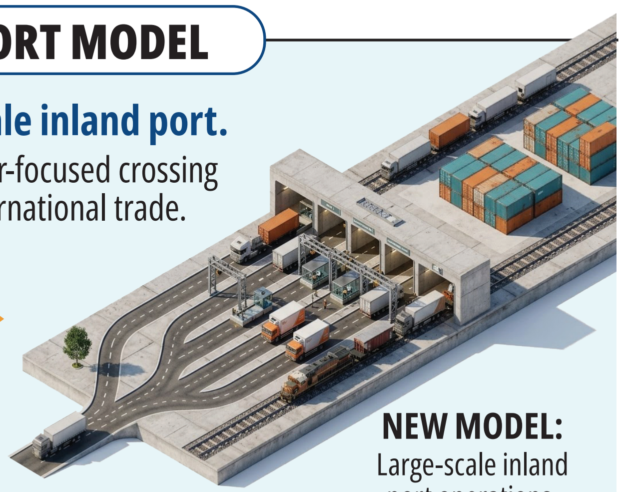
Composition: 6,500 transit via Israel
1,000 direct Israeli import/export

A NEW INLAND PORT MODEL

Transition to a large-scale inland port.

Re-designed from a passenger-focused crossing to handle high-volume international trade.

OLD MODEL:
Passenger-focused limited cargo.



NEW MODEL:
Large-scale inland port operations.

EXPANSION GUIDELINES

PHASE ONE (IMMEDIATE): EXPANSION (12 MONTHS)

Target Capacity: 1,500 trucks/day (Phase One)

- Required Handling Capacity
- Logistical Facilities
- Fast-Track Transit

PHASE TWO (GRADUAL): GROWTH (3 YEARS)

Target Capacity: 7,500 trucks/day (by ~3 years)

- Full Inter-Modal Integration
- Advanced Systems
- International Standards

OBJECTIVE: Phased capacity expansion toward international inland-port standards

Introduction

The India Middle East Europe Economic Corridor (IMEC) initiative [7] aims to create a trade and transportation corridor connecting India, the Persian Gulf, the Levant and Europe. [8] It is expected to have a broad impact on the politics, economy, and commerce of the Middle East; as well as the relations between Israel, Jordan and their neighbors.

In the short term, the initiative can be advanced by addressing the key bottlenecks that hinder its implementation. This study focuses on the primary bottleneck that obstructs the immediate advancement of IMEC. Namely, the limited capacity of the Jordan River (Sheikh Hussein) Crossing between Israel and Jordan

This study will serve as the basis for preparing a practical, technically and economically feasible plan for upgrading the Jordan River Crossing, which would enable immediate implementation of IMEC.

Background

The Jordan River Crossing is located on the northern part of the Jordan valley (**see Map 1)**. It is a critical passage on the IMEC route and serves as Israel's main gateway for overland trade with the East, as well as a key gateway for Jordan's trade with the West (see maps 1-2).

Its current capacity is extremely limited relative to demand, defined as the number of trucks seeking to cross each day. The effective capacity is 200 trucks per day, while actual demand is much higher. As analyzed in this study, present demand for passage over the Jordan River Crossing is approximately 1,500 trucks per workday, with roughly 1,000 trucks per day for transit shipments via Israel and about 500 trucks per day for direct Israeli exports and imports.

If political stability is achieved following the successful implementation of the Donald Trump Gaza peace plan, demand is projected to gradually increase to approximately 7,500 trucks per day within three years. [9] Such demand is expected to be composed of 6,500 trucks per day transit shipments via Israel, and 1,000 trucks per day direct Israeli export and import shipments.

The extreme mismatch between demand and capacity of the Jordan River Crossing derives from the basic design of the Jordan River Crossing. This crossing was not designed as a major gateway for regional trade, or as a major international passage. It was designed primarily for passenger movement, with only a small cargo terminal. Under these design-constraints, the present maximum expansion potential is 500 trucks per day.

7 The IMEC Memorandum of Understanding (MoU) was signed on 9 September 2023, during the 2023 G20 New Delhi summit, by the governments of India, United States, United Arab Emirates, Saudi Arabia, France, Germany, Italy and the European Union.

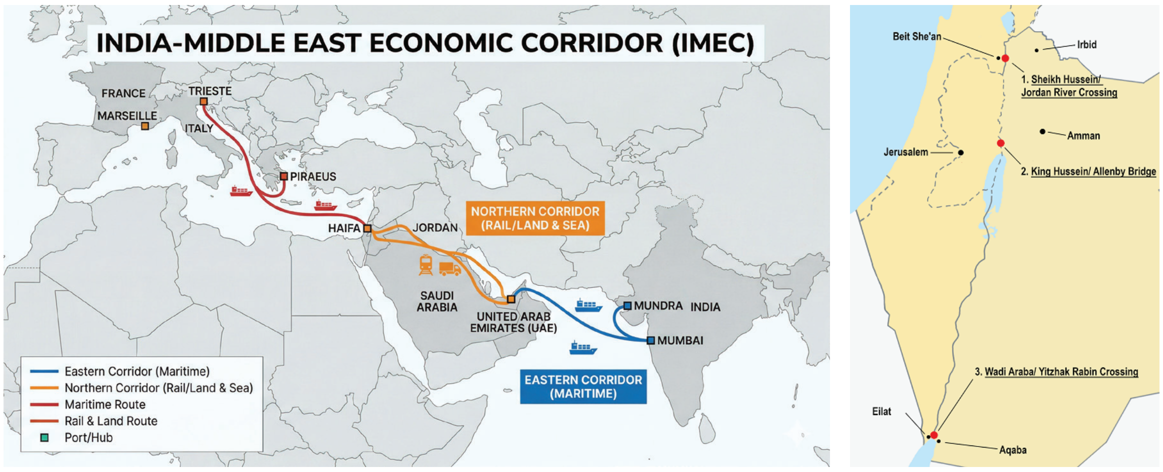
8 IMEC is also envisioned as a corridor for clean energy, digital infrastructure, and other key areas of economic cooperation. This work relates to the trade and transportation aspects of IMEC.

9 Under conditions of regional stability, the overall demand for use of the IMEC route will far exceed the 7,500 trucks per day forecast for crossing through Israel. Rough estimates place the total transit trade demand to and from Europe along the IMEC route at approximately 30,000 trucks per day (or equivalent by train). More outlets on the Mediterranean, such as the Syrian ports of Tartus and Latakia or a port in Gaza, will be needed to satisfy this volume of transit trade. Moreover, a roughly similar demand for traffic is expected to develop for inland trade on the IMEC network. For example, according to a detailed analysis of the demand for shipping goods to Gaza, once re-building starts in full speed, this component alone would generate traffic of 2,000-3,000 trucks per day from the east over the Jordan River (this flow is supposed to reach Gaza through the Allenby crossing. Thus, it is not included in the estimate of 7,500 trucks per day mentioned above). Another example is the trade activity of Turkey. The demand for traffic between Turkey and markets on the east is not included in above estimate of 7,500 trucks. These large flows are expected to be routed through Syria. The same goes for land traffic to Central Asia.

The limited capacity of the Jordan River Crossing represents the most significant constraint on the immediate operation of IMEC as a major regional and international trade route. Limited capacity creates very long delays and waiting times, forcing users to transport their cargo through longer or more expensive alternative routes. In many cases, this situation increases the business risk of using the Jordan River Crossing and inhibits the development of trade across the IMEC route.

Upgrading the Jordan River Crossing to a large inland port is essential for advancing the IMEC initiative. The rapid advancement of such upgrading will position Israel as a key player in this initiative and will also accelerate Israel's integration into the regional trade system.

Map 1: The IMEC Route and the Key Location of the Jordan River (Sheikh Hussein) Crossing



Demand for passage through the Jordan River Crossing

Methodological notes

This section presents a summary of in-depth analysis of present demand. Specifically, the number of trucks requesting passage through the crossing each day. **The detailed analysis is presented in Annex A.**

Given the present capacity constraints of the Jordan River Crossing, users of the crossing are forced to transport their cargo through alternative routes. Thus, a large part of demand is "suppressed demand". Namely, shipments that would have passed through the crossing, if capacity allowed it.

The demand for passage through the Jordan River Crossing is composed of hundreds of different streams of trade – grouped by type of commodity, origin / destination, and direction of trade (eastward or westward trade).

Demand estimates use a methodology which was developed by the author in a series of previous in-depth studies:

- The process begins with detailed mapping of trade commodities of the relevant countries by categories of commodities, origin/destination and direction of trade.
- All these combinations are analyzed and screened. Combinations that are either irrelevant for IMEC (geographically or otherwise), or where the IMEC land route has no comparative advantage over sea or air transport,

are removed (for instance: oil & gas, liquid chemicals, grains and other goods shipped in bulk by sea, high-value products such as diamonds, which are typically shipped by air, military equipment and other strategically-sensitive items).

- For each relevant trade stream, the current monetary value of trade (in USD) and the corresponding physical volume are determined (in terms of number of trucks and the number of standard containers of 20 feet = TEU per year).
- The share of the trade that would have passed through IMEC, if capacity allowed it, is estimated for each trade stream. For almost all trade streams, IMEC is one of several trade routes. Hence, IMEC "usage ratio" is estimated for each of the relevant trade streams. Then, the share of IMEC (in USD and trucks / TEU per year) is computed by multiplying the total volume of the specific trade stream by the estimated share of IMEC.
- The number of trucks / TEU per workday is then derived (assuming 280 workdays per year).

This analysis is conducted using the UN COMTRADE international trade database, which is based on trade statistics of the different countries, as reported to the UN, and cross-checked with data reported by the trading partners ("mirror data"). The analysis is refined by inputs received in interviews with Israeli and Jordanian users of the Jordan River Crossing, including information on cargo diverted to other routes and lost trade because of the crossing's capacity constraints (= "suppressed demand").

Demand estimates are separated by direction of trade: east to west trade (passing from Jordan to Israel), and west to east trade (passing from Israel to Jordan).

Next, the overall demand is estimated by aggregating all the individual trade streams.

The analysis presented in this study focuses on detailed estimation of the present "First Circle" of demand. Namely, present demand of the three countries already using the Jordan River Crossing: Israel and Jordan, and to a limited degree, also UAE trade.

Then, a less detailed analysis is presented for the "Second Circle", short-term demand as expected in 2027 if relative political stability is achieved. This analysis assumes a further diversion of the UAE's relevant trade with "Western markets" to the IMEC route; as well as start of use of the IMEC route by European and American trade with relevant Arab markets (GCC countries and Iraq) and East Asia "markets (India, China, Japan, etc.). Even though China views IMEC as a strategic rival and an Indian/Western attempt to counter its Belt and Road Initiative, Chinese trade is still expected to utilize IMEC. [10]

The study also presents preliminary indications for the scale of the "Third Circle" – "Medium-Term Demand" for use of the IMEC route, as expected to develop over 3 years, assuming continued political stability. These estimates assume (a) further diversion of relevant trade of the "markets on the West" from maritime routes to the IMEC route, wherever it provides advantage in travel-time and cost, (b) start of trade diversion from Saudi Arabia, other GCC countries, and Iraq to the IMEC route, and (c) start of trade expansion that the IMEC route is expected to generate (even though shipping via the IMEC route will still be mainly by road-transportation, with partial use of the already operative railway lines in Israel, Saudi Arabia and the UAE).

10 China views the India-Middle East-Europe Economic Corridor (IMEC) as a strategic rival and an Indian/Western attempt to counter its Belt and Road Initiative (BRI), criticizing it as geographically limited (lacking overland routes) and politically motivated, while sometimes adopting a welcoming stance on infrastructure cooperation in general, though its view is complicated by partner nations like Saudi Arabia wanting to balance ties with both US/India and China. China sees IMEC as a geopolitical tool and an alternative to its BRI, though some analysts suggest they could even be complementary, with China seeking to expand its influence within IMEC's framework too.

"First Circle" – present demand

According to the detailed analysis shown in Annex A, the present demand for passage through the Jordan River Crossing (computed as per 2023–2024 trade figures) is estimated at a total trade volume of approximately USD 30 billion per year. That is the equivalent of over 1,300 trucks per workday; split between approximately 1,000 trucks per day transit shipments via Israel, and approximately 500 trucks per day direct Israeli export and import shipments.

Most of the categories of cargo are shipped in 40 feet containers or as un-containerized cargo by trucks that carry weight equivalent to a 40f container. Hence, the equivalent figure in TEU terms is approximately 2,500 TEU per day (a 40f container = 2 TEU).

East to West trade includes:

1. **Israeli direct imports** from Jordan, the UAE (including Emirati re-exports to Israel) and Israeli imports from India and other Eastern markets. "Usage ratios" of the IMEC route for Israeli imports from these countries are calculated as follows: 100% of relevant imports from Jordan, 70% of relevant imports from the UAE and Bahrain, 40% of relevant imports from India, and 20% of relevant imports from China and other Far East countries.

2. **Transit shipments via Israel** of Jordanian, Emirati and Bahraini exports to Western markets. [11] Jordanian usage ratio of the IMEC route for export to Western markets (transit shipments via Israel) is estimated to be 70% (diversion of trade currently making the manifold longer and much more expensive detour through the Suez Canal and the Aqaba port). The usage rate of UAE (and Bahraini) transit exports to Western markets (currently shipped by sea, through the Suez Canal) is estimated to be much lower – 15% of relevant trade streams.

West to East trade includes:

3. Israeli direct exports to Jordan and the UAE, as well as Israeli exports to India and other Eastern markets. Usage ratios of the IMEC route for Israeli exports to these countries are calculated as follows: 100% of relevant exports to Jordan, 70% of relevant exports to the UAE and Bahrain, 40% of relevant exports to India, and 20% of relevant exports to China and other Far East countries.

4. Transit shipments via Israel of Jordanian, Emirati and Bahraini imports from Western markets. Jordanian usage ratio of the IMEC route for import from Western markets (transit shipments via Israel) is estimated to be 70% (diversion of trade currently making the manifold longer and much more expensive detour through the Suez Canal and the Aqaba port). The usage rate of UAE (and Bahraini) transit imports from Western markets (currently shipped by sea, through the Suez Canal) is estimated to be much lower – 15% of relevant trade streams.

In total, as shown in Table 1, estimated demand for use of the Jordan River Crossing for Israeli direct trade with markets on its East, amounts to 18% of total Israeli trade with these markets. For Jordan, the demand for use of the Jordan River Crossing for transit trade (via Israel) with Western markets of Israel, amounts to 43% of total Jordanian trade with these markets. For the UAE, the demand for use of the Jordan River Crossing for transit trade (via Israel) with Western markets of Israel, amounts to 8% of total Emirati trade with these markets.

11 The term "transit shipments via Israel of Jordanian (or UAE. etc.) exports / imports" is sometimes shortened by using "Jordanian transit shipments / trade". In all cases, the meaning is shipments that transit via Israel.

Table 1: "First Circle" – present demand for use of the Jordan River Crossing – USD millions, 2023–2024 figures

Direction of trade	Country & direction	Total export / import of country	Total export / import by direction	Demand for Jor. River Crossing (1)	% demand of total direction
East to West – direct	Israel imports from East	91,866	29,243	5,165	17.7%
East to West – transit via Israel	Jordan exports to West	13,529	4,095	1,933	47.2%
East to West – transit via Israel	United Arab Emirates exports to the West	737,229	82,291	6,390	7.8%
East to West	**Total**	**842,623**	**115,629**	**13,488**	**11.7%**
West to East – direct	Israel exports to East	60,257	12,711	2,512	19.8%
West to East – transit via Israel	Jordan imports from West	25,708	7,967	3,254	40.8%
West to East – transit via Israel	United Arab Emirates imports from West	470,536	112,815	9,319	8.3%
West to East	**Total**	**556,501**	**133,492**	**15,085**	**11.3%**
Total – direct	**Israel**	**152,123**	**41,954**	**7,677**	**18.3%**
Total – transit	**Jordan**	**39,237**	**12,062**	**5,187**	**43.0%**
Total – transit	**United Arab Emirates**	**1,207,765**	**195,105**	**15,709**	**8.1%**
Grand total – transit		**1,247,001**	**207,167**	**20,896**	**10.1%**
Grand total		**1,399,124**	**249,121**	**28,573**	**11.5%**

Note (1): relevant categories only, as per the estimated usage ratio of IMEC out of the total trade stream.

Table 2: "First Circle" – existing demand for use of the Jordan River Crossing – TEU per workday and trucks/workday

Direction of trade	Country & direction	TEU per workday	Trucks per workday
East to West – direct	Israel imports from East	524	266
East to West – transit via Israel	Jordan exports to West	224	130
East to West – transit via Israel	United Arab Emirates exports to West	502	254
East to West	**Total**	**1,250**	**651**
West to East – direct	Israel exports to East	147	91
West to East – transit via Israel	Jordan imports from West	376	191
West to East – transit via Israel	United Arab Emirates imports from West	769	393
West to East	**Total**	**1,292**	**675**
Total – direct	**Israel**	**671**	**358**
Total – transit	**Jordan**	**600**	**321**
Total – transit	**United Arab Emirates**	**1,271**	**647**
Grand total – transit		**1,871**	**968**
Grand total		**2,542**	**1,326**

"Second Circle" – short-term demand, expected in 2027, if relative political stability is achieved and maintained

Implementation of Stage Two of the Trump Plan for Gaza is expected to generate relative political stability, which would allow other potential users of the IMEC route to start diverting part of their present trade to IMEC.

Thus, the "Second Circle" demand analysis assumes: (1) further diversion of relevant trade of the UAE with Western markets from maritime routes to the IMEC route (usage ratio increase from 15% to 20% from both relevant imports and exports); (2) Start of use of the IMEC route by European and American trade with relevant Arab markets and Asian "Eastern markets", at a very modest usage rate of 1% of relevant exports and imports; and (3) average increase of trade figures by 10% in 2027, over the 2023–2024 figures.

As shown in tables 3 and 4, "Second Circle" (2027) demand for passage through the Jordan River Crossing is forecasted to more than double, to approximately 3,000 trucks per workday. Only 400 trucks per day of said demand are expected to be direct Israeli trade via the IMEC route. The rest, 2,600 trucks per day, will be transit trade passing through Israeli ports (West to East and East to West trade, combined).

In total, as shown in Table 3, estimated demand for use of the Jordan River Crossing for Israeli direct trade with markets on its East remains at 18% of total Israeli trade with these markets. For Jordan too, the demand for use of the Jordan River Crossing for transit trade (via Israel) with markets West of Israel, remains at 43% of total Jordanian trade with these markets. For the UAE, the demand for use of the Jordan River Crossing for transit trade (via Israel) with markets West of Israel, increases to 11% of total Emirati trade with these markets. For EU countries, the USA and other countries West of Israel, the demand for use of the Jordan River Crossing for transit trade (via Israel) with markets to the East of Israel (excluding Jordan and the UAE), is estimated to start at a minimal share of 0.5% of trade with these markets.

Table 3: "Second Circle" – 2027 demand for use of the Jordan River Crossing – USD millions

Direction of trade	Country & direction	Total export / import of country (2)	Total export / import by direction	Demand for Jor. River Crossing (1)	% demand of total direction
East to West – direct	Israel imports from East	101,052	32,167	5,681	17.7%
East to West – transit via Israel	Jordan exports to West	14,882	4,504	2,127	47.2%
East to West – transit via Israel	United Arab Emirates exports to West (3)	810,952	90,520	9,372	10.4%
East to West – transit via Israel	EU countries import from East (4)	2,636,285	1,093,827	5,663	0.5%
East to West – transit via Israel	USA imports from East (4)	3,356,813	1,370,144	7,545	0.6%
East to West – transit via Israel	Other West countries import from East (4)	2,397,239	985,588	5,283	0.5%
East to West	**Total**	**9,317,222**	**3,576,751**	**35,671**	**1.0%**
West to East – direct	Israel exports to East	66,283	13,982	2,763	19.8%

West to East – transit via Israel	Jordan imports from West	28,279	8,764	3,579	40.8%
West to East – transit via Israel	United Arab Emirates imports from West (3)	517,590	124,096	13,667	11.0%
West to East – transit via Israel	EU countries exports to East (4)	2,760,013	640,050	3,525	0.6%
West to East – transit via Israel	USA exports to East (4)	2,063,803	583,849	3,215	0.6%
West to East – transit via Israel	Other West countries exports to East (4)	1,929,526	489,560	2,696	0.6%
West to East	**Total**	**7,365,493**	**1,860,300**	**29,446**	**1.6%**
Total – direct	**Israel**	**167,335**	**46,149**	**8,444**	**18.3%**
Total – transit	**Jordan**	**43,160**	**13,268**	**5,706**	**43.0%**
Total – transit	**United Arab Emirates (3)**	**1,328,541**	**214,616**	**23,040**	**10.7%**
Total – transit	**EU countries (4)**	**5,396,298**	**1,733,877**	**9,187**	**0.5%**
Total – transit	**USA (4)**	**5,420,615**	**1,953,992**	**10,760**	**0.6%**
Total – transit	**Other West countries (4)**	**4,326,765**	**1,475,148**	**7,979**	**0.5%**
Grand total – transit		**16,515,380**	**5,390,902**	**56,637**	**1.1%**
Grand total		**16,682,715**	**5,437,051**	**65,117**	**1.2%**

Notes:

- Relevant categories only, as per the estimated usage ratio of IMEC out of the total trade stream
- 10% increase on 2023 / 2024 figures
- Usage ratio increases to 20%
- Usage ratio of 1%

Table 4: "Second Circle" 2027 demand for use of the Jordan River Crossing – TEU per workday and trucks/workday

Direction of trade	**Country & direction**	**TEU per workday**	**Trucks per workday**
East to West – direct	Israel imports from East	577	293
East to West – transit via Israel	Jordan exports to West	246	143
East to West – transit via Israel	United Arab Emirates exports to West	736	373
East to West – transit via Israel	EU countries imports from East	504	263
East to West – transit via Israel	USA imports from East	671	350
East to West – transit via Israel	Other West countries imports from East	470	245
East to West	**Total**	**3,204**	**1,667**
West to East – direct	Israel exports to East	162	101
West to East – transit via Israel	Jordan imports from West	414	210
West to East – transit via Israel	United Arab Emirates imports from West	1,127	576
West to East – transit via Israel	EU countries exports to East	314	164
West to East – transit via Israel	USA exports to East	286	149
West to East – transit via Israel	Other West countries exports to East	240	125
West to East	**Total**	**2,542**	**1,325**
Total – direct	**Israel**	**738**	**393**
Total – transit	**Jordan**	**660**	**353**
Total – transit	**United Arab Emirates**	**1,864**	**950**
Total – transit	**EU countries**	**817**	**426**
Total – transit	**USA**	**957**	**499**
Total – transit	**Other West countries**	**710**	**370**
Grand total – transit		5,008	2,638
Grand total		5,746	2,991

"Third Circle" – projected demand in 3 years under conditions of continued political stability

Continued political stability would generate (a) further trade diversion from maritime routes to the IMEC route wherever it has advantage in travel time and cost, and (b) trade expansion that the IMEC route is expected to generate, even though shipping via the IMEC route will still be mainly by road-transportation (trucks), with partial use of the already operative railway lines in Israel, Saudi Arabia and the UAE.

The following preliminary analysis provides a rough estimate suggesting that, under these assumptions, the "Third Circle" demand may gradually increase to approximately 7,500 trucks per day, by 2029.

The drivers of said increase in demand are expected to be:

- **Significant increase in Israeli imports** and especially re-imports from the UAE and start of direct Israeli imports from Saudi Arabia. [12] That, in addition to increased trade with Jordan, and further increase in trade diversion with Asian markets (China, India, etc.) to the IMEC route. [13] The combined impact of these trends, in combination with Israeli trade expansion with Eastern markets, would more than double the demand for use of the Jordan River Crossing for Israeli direct trade to approximately 1,000 trucks per day.
- **Significant increase in the usage ratio of the IMEC route for transit trade between "Western markets" and India.** Our estimates for "Third Circle" demand assume increase of usage ratio for these streams of East–West transit trade over the IMEC route (via Israel) to approximately 5% of relevant trade. The usage ratio for transit trade via Israel between Western markets and China (and other Far East markets) is assumed to increase to 2%–2.5% of relevant trade by 2029. These increases, in combination with East–West trade expansion, would bring the demand of these trade streams for use of the Jordan River Crossing to approximately 5,000 to 6,000 trucks per workday.
- **Faster increase of use of the IMEC route for transit trade, via Israel, between Western markets and GCC countries (excluding the UAE), [14] plus Iraq.** At an expected usage ratio of around 10% for the trade between Western markets and the GCC countries plus Iraq, that trade would add more than 1,000 trucks per day to the demand for use of the Jordan River Crossing.

Overall, the 2029 forecast projects a demand of over 1,000 trucks per workday for Israel's direct trade (imports and exports) with all Eastern markets, and approximately 6,500 trucks per day for transit trade through Israel.

Present Capacity of the Jordan River Crossing, Procedures and Constraints

Overview

The current effective capacity is between 120 and 200 trucks per workday, usually closer to the lower end of this range. Despite expansion and innovation of the logistics area on the Jordanian side a year ago, and other improvements on the Israeli side, the number of "trucks processed" per day have not increased. It is constrained by a wide range of other factors, as detailed below.

The mismatch between daily arrival volumes of trucks and the crossing's processing capacity within its limited operating time causes trucks arriving in the morning to wait until the following day to be processed. **This is a core constraint because**

12 It is expected that, once a normalization process starts between Israel and Saudi Arabia, two constraints will be among the first to be relaxed: (1) shipments carrying Israeli documents transiting from / to or through the UAE, will be allowed to pass Saudi borders; and (2) direct export from Saudi Arabia to Israel will be permitted.

13 Imported products from China and other East-Asian countries to Israel constitute a significant portion of the trade that already moves along the IMEC route from the UAE to Israel. The demand for these specific trade flows constitutes a significant share of the cumulative demand for direct Israeli imports (and exports) via the IMEC route.

14 Transit trade of the UAE is already accounted for, separately.

it transforms the crossing from a flow system into a backlog system: each day begins with an inherited queue from the previous day, and the backlog becomes structurally embedded.

Another operational feature is that the order of processing is not strictly first-come-first-served. Instead, complex and frequently changing prioritization hierarchy reportedly applies. This approach introduces operational unpredictability, reduces transparency and makes planning unreliable. For logistics operators, uncertainty about when a truck will be called is nearly as damaging as a long but predictable waiting time.

The crossing supports a wide range of industrial and agricultural products: industrial raw materials (especially for the plastics industry), garments and other textile products, fresh and other agricultural products, various manufacturing industry products, heavy loads such as steel, etc., cement, as well as bulk products such as aggregates.

This mix creates different operational needs and risks. Some goods are time-sensitive (certain agricultural or just-in-time industrial inputs), some are safety-sensitive (tankers, flammable goods), and some require more structured handling due to weight and loading patterns. Yet operational segmentation does not correspond to these differences.

In previous periods, when constraints were less severe, the crossing was able to process up to 25 trucks per hour. Hence, its technical capacity when it effectively worked 10 hours a day was 250 trucks per day. Under present development plans of the crossing's management, capacity is planned to be increased to 500 trucks per day.

Present workflow and procedures

The analysis below relates to typical East–West shipments entering the crossing from Jordan to Israel (West – East shipments are fewer and their processing is much simpler).

Workflow and procedures on the Jordanian side:

- The process begins with truck arrival to the logistics yard on the Jordanian side. The yard acts as the first control point, where trucks are staged and queued. The queuing step has effectively become a "booking and waiting" mechanism. In many cases, trucks arriving in the morning still wait until the next day to be processed.
- Once called forward, trucks proceed through weighing and customs-related steps. The physical processing infrastructure is extremely limited relative to demand: only one lane is effectively used in each direction (inbound and outbound), with one truck scale and one X-ray scanner. The result is that any fluctuation (surge arrivals, a slow inspection cycle, a minor disruption) immediately translates into queue growth.
- After weighing/clearance procedures, trucks require approval from the Land Transport Regulatory Commission. Interviewees pointed to this as a recurrent point of delay, particularly due to delays in electronic approvals. This is an administrative gating step that can stall trucks even when other processing points are ready.
- Payments are handled electronically through e-Fawatercom. Interviewees did not frame the existence of electronic payment as the problem; rather, the issue is that payments and approvals remain fragmented across multiple entities, resulting in several separate gating points rather than a unified "single release" mechanism.

Workflow and procedures on the Israeli side:

- The first step is initial inspection of the truck immediately upon entry into Israel, after the truck crosses the bridge between the two sides of the crossing – by mirrors under the belly of the truck, dogs to identify explosives, etc. If there is an indication for a more comprehensive security check, the truck is taken aside.

- If the initial inspection is okay, the truck continues to a waiting area (the "buffer area") where it is waiting to be called for scanning (trucks with bulk products, such as sand, aggregates, etc., are directed to a designated inspection area). Since the buffer area is limited, trucks from the Jordanian side are summoned in small groups for passage to the Israeli side.
- A customs/security check is carried out in the scanning area.
- At the end of this inspection, the Israeli truck that waits for the specific shipment is called and the cargo is transferred to it "back-to-back".
- If it is a transit cargo (in containers), the container is lowered to the floor after being scanned and awaits an Israeli truck for pick up.
- The typical length of the entire process (on the Israeli side) is around half a day. This means, among other things, that towards the second half of the workday, the entry of additional trucks from the Jordanian side is restricted, to reduce situations of turning back trucks that would not have enough time to be handled before the end of the workday

Regarding West – East shipments from Israel to Jordan, since the quantity of these cargoes is much smaller than the import cargoes from Jordan (and security checks are less intensive), the process is quicker and simpler. The Israeli truck enters directly into a designated area of export cargo, where it transfers its cargo to a Jordanian truck that is already waiting for it (back-to-back). Usually, it's a truck that delivered cargo from Jordan to Israel.

Main constraints relating to the Jordan River Crossing

Area and infrastructure constraints

- The total area of the Jordanian side is relatively large – 700 dunam, in comparison to only 180 dunam on the Israeli side.
- The logistic area on the Jordanian side was renovated a year ago, significantly improving the site's basic amenities. The yard can now accommodate around 1,000 trucks in terms of space and basic functionality. The facility includes rest areas, sanitary services, and simple services such as a cafeteria/coffee. Nevertheless, the processing system remains narrow: only a single lane is used in each direction, with one truck scale and one X-ray scanner. This creates a strict ceiling on throughput and makes the system highly sensitive to any disruptions. In practice, the renovated yard functions more like a buffer that absorbs congestion rather than a system that eliminates it.
- On the Israeli side, area limitations generate constraints across all steps of the operational process. The limited area available for the initial security check creates congestion if multiple trucks require deeper security checks. The small area of the "buffer" is reflected in limited number of trucks allowed to enter from the Jordanian side. The container inspection yard is limited to 100 containers, while the general cargo yard is limited to 80 trucks. The plan for increasing the capacity of the crossing to 500 trucks per day includes expansion of the container yard to accommodate 500 containers.
- The existing bridge between the Jordanian and the Israeli sides has only two lanes for all uses (all categories of cargo and passengers, two directions).

Manpower constraints

Shortage of workers is a major limiting factor on the Israeli side. It limits ability to work more shifts, and even under the present one-shift operational system, work often suffers from shortage of workers

Working hours

Working hours are short and not entirely synchronized between both sides. At present, formal working hours on the Israeli side are 8:30 to 18, while on the Jordanian side it is 8:30 to 16:30.

In practice, users of the crossing report that effective working hours are usually 09:00 to 15:00. The impact is direct and severe: even small inefficiencies become magnified when the operation window is so short.

In the past there were periods when the crossing was open from 7:00 to 20:00, and even from 7:00 to 22:00

Management, control and reporting systems

- Israel has not yet fully implemented the globally accepted reporting and tracking system for transit cargo, which is based on the legal and technical platform of the TIR Convention The same is true on the Jordanian side of the crossing, where some of the activity is still managed manually.
- Management, control and reporting systems are not synchronized between the Jordanian and Israeli sides, nor vis-à-vis the ports of origin, transit and destination of the transit cargoes passing through the crossing.
- Interviewees also state that customs staff on both sides of the crossing do not consistently adhere to TIR-related principles governing transit operations, reporting cases where container seals are broken and cargo is unloaded.

This has major operational consequences: longer inspection cycles and higher handling times; higher risk of damage, loss, and disputes; increased insurance rates and claims exposure.

Even infrequent events can have a disproportionate impact, as they introduce uncertainty into the system: operators must plan for the worst-case inspection outcome, not the average. The end-result is reduced attractiveness of the crossing and reputational risk for the corridor.

Security-related constraints

- The prevailing model is Back-to-Back rather than Door-to-Door. This operating model materially affects throughput. Back-to-Back introduces additional handling steps, coordination, and waiting, and it increases the number of points where delays can occur. It also raises the operational footprint needed per truck (space, labor, equipment), which matters when lanes and processing points are already limited.
- The impact of Back-to-Back is amplified by partial synchronization between the security protocols applied in the Israeli and Jordanian sides. Each party deals with this area separately, with non-continuous and incomplete coordination. The discontinuity and asynchronization of security processes create double handling, malfunctions and significant delays in the cargo handling processes, as well as security risks,
- Moreover, each of the inspection stages described above has manpower and space limitations, which frequently create delays and prolong waiting times. Among these: shortage of security checkers, limited area for comprehensive security checks at the entrance to the Israeli side, and more.

Other design-and-process-related aspects

- Lack of functional separation of trucks by cargo category (“standard” containerized cargo such as garments, refrigerated, flammable goods, liquid cargoes, sand and aggregates, etc.), mainly on the Jordanian side. This produces three operational problems: safety and compliance risk (hazardous/flammable goods co-located without structured handling); dispatch inefficiency (moving the wrong trucks forward first, or frequent reshuffling), higher variability in service times (some cargo categories take longer but are mixed into a single queue)

- The current Queuing logic produces next-day (or next-days) waiting as the norm. It is a procedural design choice that becomes necessary when the crossing cannot keep up with arrivals within its working hours and processing capacity.

Non-transparent prioritization increases unpredictability. The practical result is reduced predictability and higher transaction costs, because firms must build larger buffers and accept last-minute changes.

In the past, customs clearance for QIZ / FTA garment exports to the US could be completed prior to reaching the crossing through offices in Amman. Recent changes reportedly stopped this practice, increasing complexity and keeping trucks longer inside the crossing area. The operational impact is straightforward: procedures that were once performed off-site and ahead of time are now pulled into the crossing's constrained operating environment, adding to onsite workload and congestion.

Administrative weight dominates procedures on the Jordanian side. Interviewees estimate that about 80 percent of processes are administrative and only 20 percent are security-related, while on the Israeli side it is roughly the reverse. For capacity, this is a crucial diagnostic: expanding the Jordanian side is less about adding another security checks and more about removing administrative friction, consolidating approvals, and reducing handoffs.

Interviewees also link part of the delays to customs brokers' workload and documentation errors, which is reflected in recurring documentation gaps. Errors and corrections create discontinuity in the queue because a truck may advance, then stall, then require reprocessing, which is especially costly when processing capacity is limited.

Constraints relating to transit shipments across the IMEC route

In addition to the constraints that relate to the Jordan River Crossing itself, the technical and economic feasibility of its operation as a major route for regional transit trade is impacted by constraints that relate to other parts of the IMEC route.

The following are key "IMEC route" constraints relating to transit shipments:

- Transit containers must travel from their origin in the East (India, China, UAE, etc.), or in the West (Europe, USA, etc.) to their destination, without being opened or otherwise processed manually, except in rare cases. This condition is not being met right now.
- Locks and GPS tracking systems must always be on containers during the trip. Right now (for East to West shipments), containers are unloaded at Jebel Ali, and the goods are placed on trucks.
- There is currently no "green and fast" transit corridor. Cargo is often manually checked and sometimes even re-checked at land border crossings in Saudi Arabia, Jordan, and Israel.
- Insurance for the cargo for the on-land part of the journey is another key issue. Most of the businesses that use this route can insure for the in-land part only the trucks and drivers, not the goods themselves. For example, if goods are insured for the maritime part of their journey from the Indian Mundra port to the Jebel Ali port in the UAE, they are no longer insured once they are removed from the container and placed on a truck for the on-land part of their journey, until reaching the Jordan River Crossing.

Costs, economic feasibility and related aspects

The IMEC hybrid sea-land route is **cost-effective, versus sea journey via the Suez Canal or the Cape, for relevant categories of products** (even considering road transportation by trucks). **The main advantages are (1) speed** (50% saving in transit time from India to Europe, 12–18 days instead of 25–38 days), **(2) resilience** – avoiding maritime conflict zones, and **(3) inventory management and other operational & marketing advantages.**

According to a recent analysis, the overall cost of shipping a 40f container from India to Israel, by sea via the Suez Canal, is close to the overall cost of the hybrid sea – land journey via the IMEC route. [15] The route via Gibraltar is significantly cheaper, but the journey time is much longer. [16]

The following are product groups, for which the advantages mentioned above generate clear incentive for shifting shipments to the IMEC route:

- **Fresh food and vegetables** (almost all products under categories HS 02 to 09, see the detailed analysis in Annex A), as well as other products with a short shelf life of 15–30 days. **Trade in such products is possible only via the IMEC route.**
- **Seasonal products such as garments, etc.** (large part of products under categories HS 50 to 67, as well as certain products under other HS categories. see the detailed analysis in Annex A). The IMEC route has important advantages for such products.
- **Inputs and other products for Just-In-Time manufacturing sectors.** For these products, inventory savings and other logistical advantages of the IMEC route are of much higher value than the relatively small difference in shipping cost compared to the Gibraltar route.
- **High-value cargo (electronics, pharmaceuticals, and luxury goods).** For such products, the circa USD 3,000 difference in shipping cost per 40f container (Gibraltar vs. IMEC routes) is negligible in relation to the USD 200,000-plus value of the products, while speed and saving in inventory costs are much more important.

The cumulative volume of these groups is more than one third of all relevant East–West trade between the countries along the IMCE route. That, compared to our estimate of 3% to 4% of relevant trade, as shown above for the 'Third Circle" demand, predicted for 2029 (after 3 years under conditions of continued political stability).

The constraints presented above negate the following advantages of the IMEC route:

- According to estimates of interviewees, the basic freight rates are 30% higher than they would have been if the crossing had been running smoothly and properly. The low volume of activity at the crossing is also reflected in higher service rates than the rates that users would have been charged had the volume of activity been higher (costs would have been divided among many more trucks per day).

Operational delays and related problems translate into much higher measurable costs. Waiting time of a week or more, at USD 100–200 per day, translates into costs of USD 1,000-plus per truck. Cases of missing vessel containers translate into costs of around USD 2,000 per container.

Furthermore, such delays result in loss of delivery windows and commercial opportunities, pushing traders toward alternative routes even if those routes are longer.

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15 See Israel (Izzy) Haikin, "IMEC EARLY HARVEST INITIATIVE: THE "GREEN CONTAINER CORRIDOR", p. 8. The IMEC Route VS. Current Routes Table shows estimated cost of USD 6,500 per 40f container via the IMEC under current situation, against USD 7,300 via Suez (half Journey time – 14 days, against 28 days).

16 India – Israel journey via Gibraltar: USD 2,300, 45-plus days. UAE -Israel journey: via the IMEC route – USD 4,500 and 6 to 8 days; via Gibraltar – USD 2,300 and 45-plus days. See Israel (Izzy) Haikin, ibid.

In summary:

- The accumulation of these excess costs makes the freight costs via the IMEC route significantly higher than the Suez Canal route and add to the difference compared to the Gibraltar route, while the long waiting times neutralize the travel-time advantage of the IMEC route.
- When the persistent unreliability of the Jordan River Crossing is added to this, in combination with political risks and the constraints described above in relation to other parts of the IMEC route, this route becomes even less attractive.
- Once shippers restructure supply chains around alternatives, regaining traffic becomes difficult, even after improvements.

Guidelines for Expansion of the Jordan River Crossing

A paradigm shift is required

The current situation, of such an extremely low capacity relative to demand, stems from the fact that the Jordan River Crossing was not designed and built as a major gateway for international trade. It was originally designed as a passage primarily for passenger traffic, with a cargo terminal that has limited capacity.

Despite the efforts of the crossing management, the design limitations of the crossing do not allow it to increase its capacity beyond 500 trucks per day.

Therefore, a paradigm shift is required. The Jordan River Crossing should be re-defined as a large international inland port, and its physical design, operational guidelines, and other aspects of its operation adapted accordingly.

We believe that under such a new paradigm it is possible to formulate a practical, feasible plan (technically and economically) for phased upgrading, as per the guidelines suggested in this study.

Master plan and objectives

The objective of the expansion plan is a phased increase in capacity:

- **Phase One – Immediate:** Immediate increase to a stable operational capacity of 1,500 trucks per day within 12 months. That will be split between (1) Israeli trade with Jordan and markets to the East of Jordan – increase capacity to 500 truckloads per day; [17] and (2) transit trade via the IMEC route – capacity of 1,000 truckloads per day. [18]
- **Phase Two – Medium term:** gradual increase of capacity to 7,500 truckloads per day within three years. That will be split between (1) Israeli trade with Jordan and markets to the East of Jordan – 1,500 truckloads per day; and (2) transit trade via the IMEC route – capacity of 6,000 truckloads per day

A core guideline of the master plan for the expansion of the crossing, and across both phases mentioned above, is to treat the crossing as a high-throughput inland port. This means:

17 This is achievable by applying the present expansion plans of the management of the Israeli part of Jordan River Crossing. If combined with the improvements proposed, as well as improvements suggested for the Jordanian side, capacity of the present crossing would be increased to above 500 trucks per day.

18 As suggested below, that will be achieved by using the Jordan Gateway compound (of close to 1,000 dunam), as a second crossing, designated for transit shipments.

- **Multiple tracks and parallel processing lanes,** including: (1) **a separate terminal for transit shipments** where "fast track" procedures will be applied, (2) **designated lanes and facilities** for cargo types that require special handling, and (3) **incorporated redundancy** by having parallel processing lanes, to accommodate frequent fluctuations in daily number of trucks
- **Fully coordinated operation** on both sides of the crossing, and use of unified control and operation systems
- **Shift of operational orientation** – to service-oriented and performance-driven operation

The master plan should also take into consideration **longer-term plans for continuous railway connection** across the whole on-land part of the IMEC route – from the Arabian Gulf ports on the east to the Mediterranean. Railway aspects of the guidelines presented below for Phase Two will be designed as part of these longer-term plans for continuous railway connection.

General guidelines

Coordinated operation between the Israeli and Jordanian sides of the crossing

Close coordination between the Israeli and Jordanian sides is critical for proper operation of the crossing.

Israeli and Jordanian customs offices in the crossing should use the procedures and tools of the The Convention on International Transport of Goods Under Cover of TIR Carnets (TIR Convention), to which both countries are parties. TIR is essentially a transit facilitation and risk-management model. It is built around three operating assumptions that directly support faster and more predictable border processing:

- **Sealed transport and reduced physical intervention**: TIR is structured to enable goods to move across borders under customs control with sealed loads, limiting seal-breaking and unloading to clearly triggered exceptions rather than routine practice.
- **Standardized procedure and a secured mechanism**: the TIR harmonized transit document ("TIR Carnet") is supported by an international guaranteed chain. Its use reduces uncertainty around duties and taxes during transit and allows authorities to rely on a standard procedure rather than case-by-case re-creation of controls.
- **Predictability and controlled termination**: TIR aims to reduce ambiguity at control points by standardizing how movements are registered, validated, and terminated, so that compliant movements can be processed with less friction.

TIR Carnets work under international electronic systems that support the TIR transit regime.

- That includes the eTIR system that allows secured exchange of documents between customs authorities across the transport chain of a shipment; as well as the "SAFE-TIR" electronic control and information system that allows customs authorities to verify that a TIR operation has been properly terminated at the destination.
- Coordinated use of these tested international systems will enable seamless coordination between the customs systems of Israel and Jordan and provide authorities on both sides with a unified control, reporting and tracking system. This will enable seamless synchronization between the Jordanian and Israeli sides
- Furthermore, since other parties to the IMEC route are also parties to the TIR Convention, it can be used as a platform for coordinated control, reporting and tracking of shipments from their ports of origin across all border

crossings along the IMEC route, up to the specific shipment's destination. [19]

In Phase Two of the expansion plan, Israel and Jordan should also join other conventions that support simplification of international shipping by truck and railway transportation, as well as shipping by routes that combine sea, railway and road transportation. These platforms (CMR – Convention on the Contract for the International Carriage of Goods by Road, CIM – Uniform Rules Concerning the Contract for International Carriage of Goods by Rail, and ICS2 – Import Control system) are already in operation in Europe and certain other locations, enabling fully synchronized use of digital documents throughout the shipment transport chain. Another part of Phase Two will be synchronization of scanners in the other border crossings along the IMEC route to a unified IMEC control, tracking and reporting system.

Coordination with other parties on the IMEC route

Involvement of certain other parties to the IMEC route in the expansion of the Jordan River Crossing is recommended from the outset. This is particularly important given their necessary role in addressing the constraints associated with the IMEC route.

These discussions should focus on application of TIR procedures for trade across the entire IMEC route.

Under these procedures:

- Containers will be sealed physically and electronically at the port of origin of the cargo and kept sealed along the entire chain of transport until the port of destination. Containers will be opened only if there is an indication of a security risk.
- All shipments transported under these procedures will be handled as "door-to-door" shipments. When entering Israel, that will require arrangements such as secured convoys at night, etc. [20]
- Discussions with such IMEC route parties should also include insurance coverage arrangements. This issue is critical for building customer trust because the corridor needs integrated insurance coverage for both maritime and overland travel – starting from insurance coverage for the goods as it travels by sea between India and the UAE, then as it travels by truck overland through four countries, and then as it resumes maritime travel from Haifa to the final destination in Europe.

These discussions may also cover the implementation of specific procedures that facilitate seamless transportation, which have been agreed as part of the India–UAE Comprehensive Economic Partnership Agreement (CEPA), with the UAE serving as the hub of a multimodal transport corridor that supports Indian international trade.

New, coordinated security protocol

The digital platforms mentioned above can also serve as a framework for new, coordinated security arrangements.

First, establish a coordinated security protocol for the new transit terminal. Then, apply an adapted version of this new protocol to the existing crossing, with the necessary adjustments.

A key guideline for the new protocol should include an approach that views the operational areas on both sides of the crossing as a unified secured zone, while implementing advanced security technologies as an integral part of upgrading the crossing.

Such a new protocol will reduce a significant part of delays in the cargo handling process

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19 The TIR procedures will be examined and strengthened, to conform with specific Israeli (and other parties') security requirements

20 Such arrangements were practiced in the past as per Israeli security requests. Convoys at night seem also as an appropriate solution to avoid congested traffic on Israeli roads in the daytime.

Other general guidelines

- Gradual transition to continuous work, 24/7, in line with standard practices at international ports.
- The plan to upgrade the crossing should also include entry of Jordanian workers into Israel – to work at the crossing itself and later in other workplaces in Beit She'an Valley and nearby areas. Availability of Jordanian workers will help with rapid transition to 24/7 continuous operation of the crossing.
- Make required arrangements (in infrastructures and procedures) to allow safe work at night, including lighting, accommodation and catering arrangements for workers in night shifts, and more.
- Construct designated facilities for handling specific types of cargo: conveyors for transporting sand and aggregates, facilities for handling liquids transported in ISO tank containers; facilities adapted for fresh agricultural produce; and more.
- Integrate environmental protection aspects into the master plan, as well as the detailed plans for all parts and phases of the expansion.
- Prioritize advancement of the new transit terminal.

Phase One (A) – guidelines for expansion of the present cargo terminal

The present cargo terminal will be expanded to a capacity of 500 trucks per day, designated for handling "non-transit" cargo.

The general guidelines presented above will be applied to all parts and phases of the expansion plan.

The following are additional, specific guidelines for the expansion of the present crossing, designated to serve as "non-transit" cargo terminal:

- Expand the capacity of the bridge connecting the Israeli side and the Jordanian side, by building an additional bridge and/or widening the existing bridge and adding more traffic lanes.
- Expand the crossing's operational areas, especially on the Israeli side: Lease additional land from the landowners around the Israeli side of the crossing, and/or make agreements with these neighboring landowners on the use of their areas for logistical facilities that will serve the crossing. Similar moves with landowners on the Jordanian side, insofar as additional logistical facilities are required to serve the crossing on the Jordanian side as well.
- Separate between passenger and cargo traffic and operational areas, while simultaneously upgrading the passenger passage, with an emphasis on adapting capacity and arrangements to much larger tourist traffic in both directions.
- Eliminate specific bottlenecks throughout the operational process, by adding weighing, scanning, and inspection lanes, equipment and supporting facilities.
- Enable off-site customs and other procedures, before entry of the truck into the crossing.
- Treat both sides of the crossing as a unified terminal. This entails: the introduction of yard zoning with basic controls on the Jordanian side (barriers, markings, and marshals) so trucks are staged by category and only called forward when they meet minimum readiness requirements; flexible lane management to match inbound and outbound demand; add dedicated inspection and exception pockets so intensive checks and unloading do not block the main throughput path; partial shifting of back-to-back handling to the Jordanian side as well (start with a pilot to test whether and how it reduces security-driven congestion and improves overall operational flow).

- Operation of the crossing under joint but clear and accountable leadership and disciplined shift management. This requires a clear operating model featuring a designated flow owner, dispatch control, and lane supervisors, along with a clearly established joint exception-resolution process and function.
- Introduce a set of process interventions, designed to stop administrative steps from dictating lane performance. In addition to gradual extension of operating time to two shifts and then 24/7 operation, ensure that all gating functions are present and responsive over the crossing worktime. Flow control is further strengthened through an appointment-based call-forward system, a clearly defined sequencing policy, and a document quality checkpoint that prevents incomplete submissions from entering the main lanes. A single unified "release status" is introduced to prevent trucks from stalling between approvals, and exceptions are isolated, so they are resolved off the critical path.
- Flag and address recurring friction points such as payment confirmation delays.
- Introduce response-time standards for approvals so productivity is not lost to waiting on a single delayed actor.
- Also address delays caused by users – broker errors and driver confusion which create rework, introduce instruction and training for customs brokers and drivers on issues such as submission standards, practical multilingual guidance, etc.

In summary, the aim is to stabilize daily flow and convert the crossing from a "queue-driven" system into a managed terminal. The core idea is simple: keep the main lanes moving by controlling what enters them, removing bottlenecks, and ensuring all required actors operate in aligned shifts.

That means a fundamental change in the present situation whereas throughput is determined not only by how many trucks arrive, but by how many are forced into time-consuming, lane-blocking interventions. When the prevailing practice shifts towards routine seal-breaking, unloading, or repeated manual checks, the crossing effectively treats a large share of movements as "exceptions," which increases cycle time, increases variability, and accelerates backlog formation.

Use of TIR and its digital and operational tools will allow authorities to reduce administrative friction and support pre-arrival decision-making. The most critical capabilities, from a throughput point of view, are:

- Pre-arrival data submission: enabling risk analysis before the truck reaches the gate, which reduces waiting caused by "unknown" shipments and late document checks.
- Real-time validity and termination controls, reducing repeated checks and disputes.
- Standardized customs interfaces: supporting consistent processing and reducing manual handoffs.
- A pathway to electronic transit: enabling customs-to-customs data exchange where procedures are run digitally rather than paper-driven.

These enablers are not "additional features"; they are directly tied to the main operational issue at the crossing: the dominance of administrative waiting and the spillover of exceptions into the main throughput path. Implementation of these changes will allow separating "main flow" from "exceptions". It will enable most of the trucks to be processed as "ready-to-release" rather than "arrive-and-then-decide." That shift will reduce administrative friction and radically increase processing capacity, even within existing physical constraints.

Phase One (B) – developing a separate "fast track" transit terminal in the Jordan Gateway Industrial Park

Given the magnitude of transit trade and its different features, it should be processed separately.

The most appropriate location for a separate fast-track transit terminal is the Jordan Gateway Industrial Park. This is an estate of approximately 1,000 dunam, located 9 km south of the Jordan River Crossing (see maps 2 and 3).

Jordan Gateway consists of Israeli and Jordanian parts, with a wide bridge connecting the two sides. It enjoys a status of free-trade zone according to Jordanian law and developed infrastructure, but only a very small part of it is utilized.

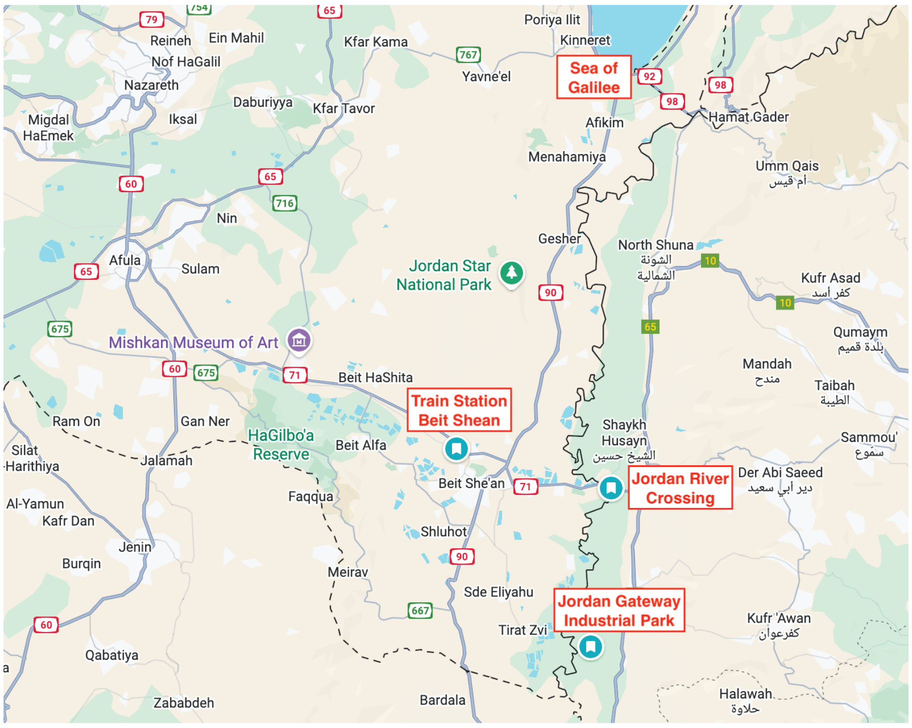
The proposed "Jordan Gateway Transit terminal" will be designed as an inter-modal land port. It will be integrated with the wider system of the Jordan River Crossing, connected to the Haifa – Beit Shean railway line (see the nearby Beit Shean railway station on map 2), and work in close coordination with the Israeli Mediterranean Sea ports in the area of Haifa (the Port of Haifa, the Haifa Bay Port and the Israel Shipyards Port).

The vast area of the Jordan Gateway, developed infrastructure and its status of a free trade zone, enable it to support the large demand for transit trade expected on the IMEC route. In addition to being a well-functioning cargo terminal, it will enable development of the required logistical and other facilities. That includes (1) temporary storage of west-directed transit cargo while waiting for loading on ships in Israeli ports, or east-directed transit cargo waiting to be loaded on trucks – thus eliminating the back-to-back procedure in the transit terminal; and (2) longer-term storage, including services for sectors requiring Just-In-Time supply, etc.; and (3) a wide range of other services and facilities, including designated facilities for handling of bulk, liquid, sensitive products, etc.; various packaging and processing facilities, and more.

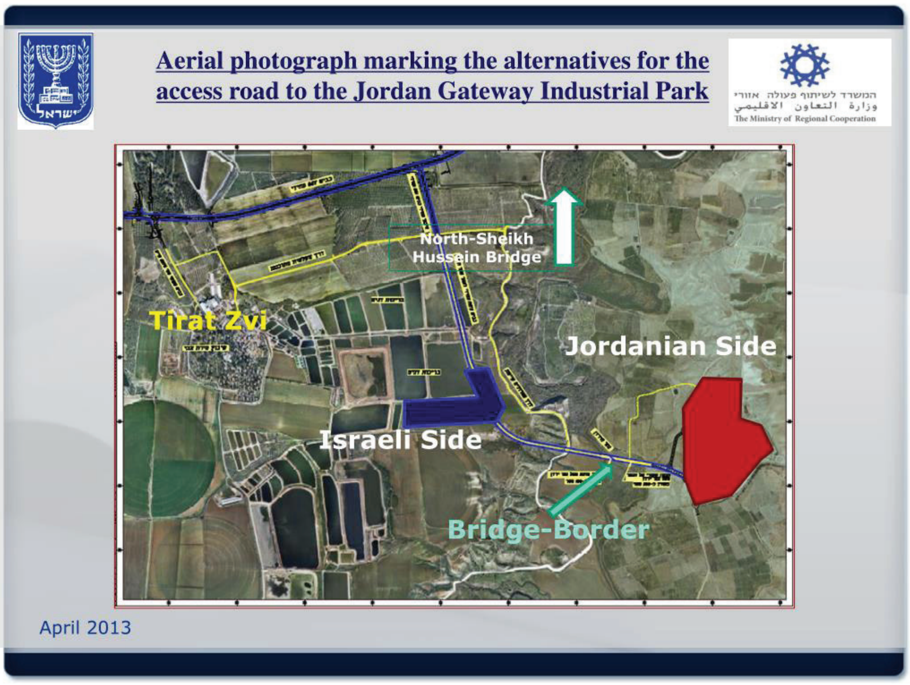
Since the infrastructure of the Jordan Gateway facility is already developed, it can start working almost immediately after an agreed Jordanian – Israeli decision is made for its operation as a transit terminal.

- We propose starting with a pilot plan over a period of 12 months. This pilot will start with 10 trucks per month and gradually increase to 1,000 trucks per month. The pilot will be designed and conducted together with interested shipping companies, use the TIR rules and procedures, and serve as proof of concept ("POC").
- Through this POC phase, the procedures and practices of the transit terminal and other key points along the IMEC route will be tested and perfected. That includes procedures in border crossings and sea ports along the IMEC route and coordination between these points, use of roads in the different countries by IMEC trucks, hybrid road – railway solutions, synchronized customs monitoring and control procedures, etc.
- This period of 12 months will be used, in parallel, for preparing a detailed plan outlining the required changes and investments needed to establish Jordan Gateway as an efficient and fully functioning transit terminal.
- The Jordan Gateway transit terminal will be designed to support traffic of 1,000 trucks per day immediately after the first 12 months POC phase, and then gradually expand to 6,000 trucks per day over a period of three years.

Map 2: Jordan River (Sheikh Hussein) Crossing and Jordan Gateway



Map 3: Detailed Map of the Jordan Gateway Industrial Park



Phase Two: gradual expansion to capacity of 7,500 trucks per day (three years from approval of the master plan)

The objective of Phase Two is to build a world-class inland port. This will be achieved by a set of infrastructural, process-related and governance-and-performance-related steps.

Infrastructure

- Re-design the physical infrastructure, based on multi-lane architecture with built-in redundancy to reduce the risk of single-point congestion and support continuous operations, safe segregation, and predictable flow through parallel lanes.
- Separation of flows, with dedicated arrangements for special cargo categories.
- Corridor-level digital management, and a network approach that distributes volumes across nodes rather than forcing growth through single gates, which become bottlenecks.
- Expansion of supporting infrastructure beyond lanes, including services and facilities that make 24/7 operations feasible and safe, such as compliant holding and warehousing solutions, cold-chain support, and staff facilities that sustain shift-based work.

Process

- Establishment and operation of corridor-level management system through an “IMEC corridor coordinated platform” that integrates truck appointments, tracking, payments, cross-border transit and release, and performance dashboards across crossings. The rules and procedures under which the “IMEC corridor coordinated platform” will operate will be designed using protocols already implemented in other parts of the world.
- Establish formal track-based regimes with distinct processes and operating rules for bilateral trade, transit shipments, special cargo, empty containers, and passengers – so incompatible flows no longer compete under one set of procedures.
- Transit flows are facilitated through better pre-arrival data use, standardized controls, and auditable exception handling that preserve throughput while maintaining control and strengthening security.
- Joint Jordanian – Israeli operating protocols are institutionalized into structured planning, incident management, and surge handling, moving coordination from ad hoc problem-solving to routine operational governance.

Governance and performance

- Coordination in building professional operating capacity that can develop the new multi-terminal, multi-lane system and manage scale across nodes, and coordinate processing of trade across the IMEC route.
- Establishing a formal “IMEC coordination mechanism” that will coordinate operations and facilitate dispatch, performance control, and compliance across the IMEC route.
- Steps to facilitate compliance of users of the IMEC route and their integration into the performance model; through certification and tiered access, where eligibility for faster processing is linked to documentation quality and compliance. This approach reduces avoidable re-work, increases predictability, and creates incentives aligned with throughput and reliability.

In parallel with the above, establish a connection between the Jordan River Crossing—primarily the Jordan Gateway transit terminal—and the Haifa–Beit She’an railway line.

- Several possibilities of such a railway connection need to be examined: a “regular” railway connection (to the transit terminal only? to both terminals?), a monorail connection over the Jordan River? One or more railway stations on the Jordanian side (and their exact location)?

- Simultaneously, establish a connection between the Haifa–Beit She'an railway line and the various seaports in the Haifa area.
- Arrangements for immediate use of this railway line, based on a hybrid truck- railway systems (a short 15 km truck trip from the Jordan Gateway transit terminal to the Beit Shean railway station, and then night trains to the Haifa port. [21]

Other important guidelines for Phase Two:

- Examining possibilities for cooperation with world-class Emirati companies that operate ports in neighboring countries and have strategic interest in IMEC (Dubai World, Abu Dhabi Ports). [22] That would require appropriate structuring of the initiative based on PPP models, inclusion of international operators, etc.
- The plan for Phase Two of the Jordan River Inland Port should be aligned with the longer-term railway-based plans of the IMEC initiative, as well as the plans for IMEC clean energy and digital corridors.

Annex A: Detailed Analysis and Quantitative Estimates of Demand for Use of the Jordan River Crossing

Methodological notes

Present situation

Present demand for use of the Jordan River crossings is estimated in this study to be more than 1,300 trucks per day. This is in contrast to the fewer than 200 trucks per day that currently pass through the crossing.

Unsatisfied demand is expressed in many ways, including long waiting times (sometimes weeks, mainly relating to trucks coming from the east) before a truck enters the crossing; an informal "quota" system (namely, shippers are permitted to bring only a limited number of trucks into the crossing); and, most importantly, the diversion of movement to much longer (but more dependable) maritime routes. Certain "urgent" or "important" shipments are prioritized (for example, aid shipments from Jordan to Gaza), which further delays the entry of non-prioritized shipments. Moreover, even this limited movement suffers from frequent interruptions due to security and political conditions, which add to the political risk of using the Jordan River crossings.

The end-result of this situation is that use of the Jordan River Crossing is confined mainly to shipments that must use it. Most of the potential users (Israeli, Jordanian and regional, as well as international users) prefer using much longer (but more dependable and less risky) maritime routes, if they can. Moreover, under this situation, companies are discouraged from developing business relations that depend on the Jordan River Crossing.

21 This is suggested as a temporary arrangement, until the Haifa – Beit Shaen railway line is upgraded, to allow parallel use for passengers and cargo in day time as well.

22 The interests of these two companies extend across the entire region, and beyond. Thus, even though DP World will operate the Tartus Port, it may be interested in the Jordan River inland port, as well as other key points on the IMEC route.

The methodology

The methodology used for this analysis was developed in a series of previous detailed studies conducted by the author. These studies included, among other things, detailed analysis and forecast of regional trade streams (and international trade passing through the region), as part of work on the master plan of the Israel Ports Company; multiple in-depth studies on traffic development in Israel-Jordan and Israeli-Palestinian commercial land crossings, including detailed work as part of the long-term plan of the Israeli Crossings Authority; a detailed work on the potential for export by land of Israeli fresh agricultural products to the UAE market; multiple works on various aspects of regional land transportation, including IMEC and "pre-IMEC" initiatives for regional railway connectivity, as well as road-based trade corridors from the East to Israel, the West Bank and Gaza.

The core of this methodology is: (a) identification of relevant trade streams based on the specific analysis (in this study, trade streams passing through the Jordan River crossings), and (b) estimate of present and projected demand for use of the IMEC route, by detailed computation of the volume of these trade streams, in USD millions, TEU and in number of trucks per year.

The demand estimates presented in this study are based on analyzing hundreds of trade streams in each country and direction of trade (export and import streams by origin / destination), and product groups, using the HS product-categorization system.

For each stream, the analysis includes:

5. Calculation of volume of trade in 2024 or 2023 in USD millions. The analysis is based on detailed international trade statistics, using the UN COMTRADE database which consolidates data reported by individual countries and incorporates "mirror data" from trading partners when necessary.

6. Estimation of expected "usage ratio of the IMEC route" out of the total volume of the specific stream. For example, the usage ratio for Israeli exports to Jordan is 100% of all relevant trade streams, as there is no effective alternative sea route that competes with the IMEC land route. On the other hand, for Israeli imports from China (and other far east countries), as well as the much smaller exports to these countries, the study estimates that the demand for use of IMEC ("usage ratio of IMEC") is only 30% of relevant trade streams, while 70% will continue to be shipped by maritime routes. Usage ratio of IMEC for Jordanian trade (exports and imports) with the West (European and American markets) is assumed to be 70%, while that of the UAE is assumed to be only 15%.

7. Groups of products which are irrelevant for IMEC are excluded from the analysis. These include the following groups: products shipped in bulk (oil & gas products, chemicals, grains, etc.); vehicles and other transportation products; live animals; certain very expensive light-weight product groups (such as diamonds, etc.) which are shipped by couriers or by air; sensitive or strategic products; as well as other products categorized as "unspecified" in trade statistics.

8. This statistical – economic analysis is refined by inputs from interviews and discussions with users of the route and the Jordan River Crossing.

9. These "demand estimates" for each trade stream are then converted from annual USD value to TEU per year, TEU per workday, and the corresponding number of trucks per workday.

Overall demand is then estimated by aggregation of all the streams.

The analysis presented in this study focuses on detailed estimation of the present "First Circle" of demand. Namely, present demand (actual and suppressed, according to 2023 / 2024 trade figures) of the three countries already using the Jordan River Crossing: Israel and Jordan, and to a limited degree also UAE trade (15% of the UAE's present relevant trade with European and American countries, hereinafter “Western markets”).

Next, a less detailed analysis is presented for the “Second Circle”, short-term demand as expected in 2027 if the Trump Plan for Gaza is implemented and relative political stability is maintained. This analysis assumes some more diversion of the UAE’s relevant trade with “Western markets” to the IMEC route; as well as start of use of the IMEC route by European and American trade with relevant Arab markets (GCC countries and Iraq) and Asian “Eastern markets” (India, China, Japan, etc.).

The study also presents preliminary projections for the “Third Circle” – medium-term demand for the IMEC route, expected to develop over the next three years, assuming continued political stability. That would allow more potential users of the IMEC route to start diverting part of their present trade to the IMEC route. These estimates assume (a) further diversion of relevant trade of the “Western markets” from maritime routes to the IMEC route, wherever it provides advantage in travel-time and cost, (b) start of trade diversion of Saudi and other GCC countries and Iraq to the IMEC route, and (c) start of trade expansion that the IMEC route is expected to generate (even though shipping via the IMEC route will still be mainly by road-transportation, with partial use of the already operative railway lines in Israel, Saudi Arabia and the UAE).

“First Circle”: present demand of countries already using the Jordan River Crossing

The analysis below shows that **the present demand for passage through the Jordan River Crossing, based on trade figures for 2024 and 2023, is estimated at approximately USD 30 billion. That is translated to circa 1,300 trucks per day** (assuming 280 workdays a year, taking into account 6 operating days per week and holidays). Most of the categories of cargo are shipped in 40 feet containers or as un-containerized cargo by trucks that carry weight equivalent to a 40f container. Hence, the equivalent figure in TEU terms is approximately 2,500 TEU per day.

Present demand is computed for the “First Circle” of trade. Namely, the trade of three countries that are currently using the Jordan River Crossing: Israeli and Jordanian trade, and to a limited degree UAE trade.

East to West trade:

- Israeli imports from Jordan (including indirect imports from Saudi Arabia registered as imports from Jordan)
- Israeli imports from the UAE (including Emirati re-exports to Israel. Namely, products of other countries that are re-exported to Israel)
- Israeli imports from India and other Eastern markets (Far-East Asian markets and Oceania), where the IMEC route has travel time or cost advantage, in comparison to maritime routes
- Jordanian transit exports to Western markets, currently exported via the Aqaba Port
- UAE (and Bahraini) transit exports to Western markets (demand of only 15% of relevant trade at this stage)

West to East trade

- Israeli exports to Jordan
- Israeli exports to the UAE (and Bahrain)
- Israeli exports to India and other Eastern markets
- Jordanian transit imports from Western markets
- UAE (and Bahraini) transit imports from Western markets (demand of only 15% of relevant trade at this stage)

Notes:

- Demand calculations exclude Palestinian trade with Jordan, Arab markets and other Eastern markets, as well as shipments from the East to the Gaza Strip. All these trade streams are assumed to pass through the King Hussein (Allenby) Crossing.

- Demand calculations also exclude Turkish trade with Arab and other Eastern markets. These trade streams are assumed to pass through Syria.

Summary Table A-1: "First Circle" present demand for use of the Jordan River Crossing – USD millions, 2023–2024 figures

Direction of trade	Country & direction	Total export / import of country	Total export / import by direction	Demand for Jor. River Crossing (1)	% demand of total direction
East to West	Israel imports from East	91,866	29,243	5,165	17.7%
	Jordan exports to West	13,529	4,095	1,933	47.2%
	United Arab Emirates exports to West	737,229	82,291	6,390	7.8%
	Total	842,623	115,629	13,488	11.7%
West to East	Israel exports to East	60,257	12,711	2,512	19.8%
	Jordan imports from West	25,708	7,967	3,254	40.8%
	United Arab Emirates imports from West	470,536	112,815	9,319	8.3%
	Total	556,501	133,492	15,085	11.3%
	Israel	152,123	41,954	7,677	18.3%
Total	**Jordan**	**39,237**	**12,062**	**5,187**	**43.0%**
	United Arab Emirates	**1,207,765**	**195,105**	**15,709**	**8.1%**
	Grand total	**1,399,124**	**249,121**	**28,573**	**11.5%**

Note: relevant categories only, as per the estimated usage ratio of IMEC out of the total trade stream

Table A-2: Factors for converting streams in USD million to TEU and trucks per day

(280 workdays per year, preliminary estimates – to be improved) (1)

Product category group	HS code	Value per ton in USD	Tons per container	Value in USD per container	Truck = 40f or 20f container
		(per product group)	(per product group)	(per product group)	(per product group)
Fresh food and vegetables; non-live, no-cereals	2 to 9	1,500	12	18,000	40f
Processed food products, etc.	11 to 24	3,000	20	60,000	40f
Stone, cement, ores, etc.	25 to 26	300	25	7,500	40f
Pharmaceutical products	30	50,000	8	400,000	40f
Fertilizers	31	800	25	20,000	20f
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	5,000	20	100,000	40f
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	4,000	20	80,000	40f
Textile, garments, footwear and related articles	50 to 67	6,000	15	90,000	40f
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	1,000	25	25,000	40f
Metals and metal products of all kinds	72 to 83	2,000	20	40,000	40f
Machinery, electrical products, equipment, etc.	84 to 86	15,000	12	180,000	40f
Optical, measurement, musical instruments, etc.	90 to 92	40,000	5	200,000	20f
Furniture, toys and other manufactures products	94 to 96	6,000	15	90,000	40f

Note: validation of these preliminary estimates against the number of full containers that were handled in Israeli sea ports in 2024, as per their origin and destination, shows that the estimates in our analysis are conservative. According to the statistical yearbook of the Israeli Administration of Shipping and Ports, the total number of full containers arriving from ports in the East or destined to the East, was approx. 480 thousand (Table 2.8.2 and 29.2 pages 59 and 61). The equivalent total number of Israeli import and export containers according to our calculations is around 300 thousand containers. Even if Palestinian and other non-Israeli containers handled in Israeli ports are taken into consideration, our calculations are still way below actual 2024 figures.

Summary Table A-3: "First Circle" present demand for use of the Jordan River Crossing – TEU per workday and trucks/workday

Direction of trade	Country & direction	TEU per workday	Trucks per workday
East to west	Israel imports from East	524	266
	Jordan exports to West	224	130
	United Arab Emirates exports to West	502	254
	Total	1,250	651
West to East	Israel exports to East	147	91
	Jordan imports from West	376	191
	United Arab Emirates imports from West	769	393
	Total	1,292	675
Total	**Israel**	**671**	**358**
	Jordan	**600**	**321**
	United Arab Emirates	**1,271**	**647**
	Grand total	**2,542**	**1,326**

Israeli present demand –
Detailed analysis (“First Circle“, 2024 figures)

Table A-4-1: Total Israeli imports, relevant categories and the demand for use of the IMEC route (imports from East, 2024 USD millions)

Product category group	HS Group	World grand total	World total Relevant for IMEC	Total for import from East Incl. irrelevant	Demand for import via IMEC
Animals; live	1	372	-		-
Fresh food and vegetables; non-live, no-cereals	2 to 9	3,258	3,258		90
Cereals	10	931	-		-
Processed food products, etc.	11 to 24	5,276	5,276		301
Stone, cement, ores, etc.	25 to 26	530	530		23
Oil & gas, fuels, chemicals	27 to 29	11,326	-		-
Pharmaceutical products	30	3,631	3,631		14
Fertilizers	31	128	128		27
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	2,120	2,120		146
Explosives	36	8	-		-
Chemical products, plastics & poly-mers, rubber, wood, pulp & paper, etc.	37 to 49	7,081	7,081		611
Textile, garments, footwear and related articles	50 to 67	4,512	4,512		550
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	1,391	1,391		129
Diamond, Jewelery, etc.	71	4,021	-		-
Metals and metal products of all kinds	72 to 83	6,152	6,152		1,041
Machinery, electrical products, equipment, etc.	84 to 86	22,709	22,709		1,837
Vehicles & ships, aircrafts, etc.	87 to 89	9,977	-		-
Optical, measurement, musical instruments, etc.	90 to 92	3,891	3,891		159
Arms & ammunition	93	68	-		-
Furniture, toys and other manufac-tures products	94 to 96	2,271	2,271		237
Works of art and not specified	97 to 99	2,214	-		-
Total per year		**91,866**	**62,948**	**29,243**	**5,165**

Note: Irrelevant categories in grey

Table A-4-2: demand for Israeli imports from the East via IMEC by stream

(Relevant categories and the % projected to shift to IMEC (2024, USD millions)

Product category group	HS Group	Total from East	Jordan	UAE & Bahrain	India	China & HK	S. Korea & Japan & Singapore	Other East
			100%	**70%**	**40%**	**20%**	**20%**	
Animals; live	1							
Fresh food and vegetables; non-live, no-cereals	2 to 9	90	24	5	9	42	2	8
Cereals	10	-	-	-	-	-	-	-
Processed food products, etc.	11 to 24	301	17	146	19	41	52	27
Stone, cement, ores, etc.	25 to 26	23	10	3	1	1	6	2
Oil & gas, fuels, chemicals	27 to 29	-	-	-	-	-	-	-
Pharmaceutical products	30	14	-	1	5	5	2	1
Fertilizers	31	27	0	21	0	3	1	2
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	146	4	76	8	37	7	13
Explosives	36	-	-	-	-	-	-	-
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	611	73	79	55	304	46	54
Textile, garments, footwear and related articles	50 to 67	550	18	8	82	381	12	49
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	129	14	15	22	64	3	11
Diamond, Jewelery, etc.	71	-	-	-	-	-	-	-
Metals and metal products of all kinds	72 to 83	1,041	67	475	39	343	25	92
Machinery, electrical products, equipment, etc.	84 to 86	1,837	110	306	98	833	327	162
Vehicles & ships, aircrafts, etc.	87 to 89	-	-	-	-	-	-	-
Optical, measurement, musical instruments, etc.	90 to 92	159	0	6	10	103	26	14
Arms & ammunition	93	-	-	-	-	-	-	-
Furniture, toys and other manufactures products	94 to 96	237	6	6	7	195	3	21
Works of art and not specified	97 to 99	-	-	-	-	-	-	-
Total per year		**5,165**	**343**	**1,147**	**355**	**2,351**	**511**	**457**

Table A-4-3:
Summary – Israeli demand for import from the East via IMEC

Product category group	HS Group	Demand from East USD millions	2024 TEU from East (40f = 2 TEU)	Number of trucks (truck = a 40f or 20f container)
Animals; live	1	-	-	-
Fresh food and vegetables; non-live, no-cereals	2 to 9	90	10,013	5,007
Cereals	10	-	-	-
Processed food products, etc.	11 to 24	301	10,032	5,016
Stone, cement, ores, etc.	25 to 26	23	6,043	3,022
Oil & gas, fuels, chemicals	27 to 29	-	-	-
Pharmaceutical products	30	14	70	35
Fertilizers	31	27	1,372	1,372
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	146	2,917	1,458
Explosives	36	-	-	-
Chemical products, plastics & poly-mers, rubber, wood, pulp & paper, etc.	37 to 49	611	15,267	7,634
Textile, garments, footwear and related articles	50 to 67	550	12,213	6,107
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	129	10,329	5,165
Diamond, Jewelery, etc.	71	-	-	-
Metals and metal products of all kinds	72 to 83	1,041	52,067	26,033
Machinery, electrical products, equip-ment, etc.	84 to 86	1,837	20,407	10,204
Vehicles & ships, aircrafts, etc.	87 to 89	-	-	-
Optical, measurement, musical instruments, etc.	90 to 92	159	794	794
Arms & ammunition	93	-	-	-
Furniture, toys and other manufac-tures products	94 to 96	237	5,275	2,638
Works of art and not specified	97 to 99	-	-	-
Total per year		**5,165**	**146,799**	**74,482**
TEU per workday	**524**			
Trucks per workday	**266**			

Table A-5-1:
Total Israeli exports, relevant categories and the demand for use of the IMEC route for exports to East (2024 USD millions)

Product category group	HS Group	World grand total	World total Relevant	Total for export to East Incl. irrelevant	Demand for export via IMEC
Animals; live	1	21			
Fresh food and vegetables; non-live, no-cereals	2 to 9	1,310	1,310		17
Cereals	10	1			
Processed food products, etc.	11 to 24	1,506	1,506		98
Stone, cement, ores, etc.	25 to 26	103	103		3
Oil & gas, fuels, chemicals	27 to 29	6,713			
Pharmaceutical products	30	1,818	1,818		12
Fertilizers	31	1,622	1,622		133
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	1,167	1,167		38
Explosives	36	0			
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	6,169	6,169		100
Textile, garments, footwear and related articles	50 to 67	941	941		32
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	196	196		13
Diamond, Jewelery, etc.	71	6,371			
Metals and metal products of all kinds	72 to 83	2,264	2,264		121
Machinery, electrical products, equipment, etc.	84 to 86	17,922	17,922		1,240
Vehicles & ships, aircrafts, etc.	87 to 89	2,310	-		-
Optical, measurement, musical instruments, etc.	90 to 92	7,438	7,438		695
Arms & ammunition	93	1,753	-		-
Furniture, toys and other manufactures products	94 to 96	492	492		10
Works of art and not specified	97 to 99	138	-		-
Total per year		**60,257**	**42,949**	**12,711**	**2,512**

Note: Irrelevant categories – grey

Table A-5-2:
Demand for Israeli exports to the East via IMEC by stream

(Relevant categories and the % projected to shift to IMEC (2024, USD millions)

Product category group	HS Group	Total to East	Jordan	UAE & Bahrain	India	China & HK	S. Korea & Japan & Singapore	Other East
			100%	70%	40%	20%	20%	
Animals; live	1							
Fresh food and vegetables; non-live, no-cereals	2 to 9	17	1	8	2	1	2	2
Cereals	10							
Processed food products, etc.	11 to 24	98	15	4	11	22	33	14
Stone, cement, ores, etc.	25 to 26	3	0	0	1	1	1	0
Oil & gas, fuels, chemicals	27 to 29							
Pharmaceutical products	30	12	0	0	5	0	4	2
Fertilizers	31	133	2	2	58	47	6	18
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	38	0	2	4	11	15	5
Explosives	36							
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	100	8	4	41	17	16	14
Textile, garments, footwear and related articles	50 to 67	32	1	4	6	9	8	4
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	13	0	2	5	2	2	2
Diamond, Jewelery, etc.	71							
Metals and metal products of all kinds	72 to 83	121	4	7	33	25	36	17
Machinery, electrical products, equipment, etc.	84 to 86	1,240	30	66	460	333	180	171
Vehicles & ships, aircrafts, etc.	87 to 89							
Optical, measurement, musical instruments, etc.	90 to 92	695	1	91	64	290	154	96
Arms & ammunition	93							
Furniture, toys and other manufactures products	94 to 96	10	4	2	0	1	2	1
Works of art and not specified	97 to 99							
Total per year		**2,512**	**66**	**190**	**691**	**760**	**459**	**346**

Table A-5-3: Summary – Israeli demand for export to the East via IMEC

Product category group	HS Group	Demand from East USD millions	2024 TEU to East (40f = 2 TEU)	Number of trucks (truck = a 40f or a 20f container)
Animals; live	1			
Fresh food and vegetables; non-live, no-cereals	2 to 9	17	1,854	927
Cereals	10			
Processed food products, etc.	11 to 24	98	3,266	1,633
Stone, cement, ores, etc.	25 to 26	3	769	384
Oil & gas, fuels, chemicals	27 to 29			
Pharmaceutical products	30	12	59	29
Fertilizers	31	133	6,628	6,628
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	38	760	380
Explosives	36			
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	100	2,491	1,246
Textile, garments, footwear and related articles	50 to 67	32	716	358
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	13	1,033	517
Diamond, Jewelery, etc.	71			
Metals and metal products of all kinds	72 to 83	121	6,064	3,032
Machinery, electrical products, equipment, etc.	84 to 86	1,240	13,783	6,891
Vehicles & ships, aircrafts, etc.	87 to 89			
Optical, measurement, musical instruments, etc.	90 to 92	695	3,477	3,477
Arms & ammunition	93			
Furniture, toys and other manufactures products	94 to 96	10	231	115
Works of art and not specified	97 to 99			
Total per year		**2,512**	**41,131**	**25,618**
TEU per workday	**147**			
Trucks per workday	**91**			

UAE present demand analysis (“First Circle“, 2023 figures)

Table A-6-1: Total UAE imports, relevant categories and the demand for use of the IMEC route (2023 USD million)

Product category group	HS Group	World grand total (4)	World total Relevant	Total import from West Incl. irrelevant	Demand for import via IMEC
Animals; live	1	122			
Fresh food and vegetables; non-live, no-cereals	2 to 9	10,627	10,627		504
Cereals	10	1,541			
Processed food products, etc.	11 to 24	11,508	11,501		697
Stone, cement, ores, etc.	25 to 26	2,245	2,245		17
Oil & gas, fuels, chemicals	27 to 29	26,535			
Pharmaceutical products	30	6,175	6,175		691
Fertilizers	31	115	84		4
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	7,100	7,100		685
Explosives	36	26			
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	17,540	17,540		941
Textile, garments, footwear and related articles	50 to 67	13,617	13,611		467
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	2,312	2,312		86
Diamond, gold, Jewelery, etc.	71	114,876			
Metals and metal products of all kinds	72 to 83	19,963	19,963		482
Machinery, electrical products, equipment, etc.	84 to 86	104,078	104,076		3,602
Vehicles & ships, aircrafts, etc.	87 to 89	38,740	-		-
Optical, measurement, musical instruments, etc.	90 to 92	8,122	8,122		936
Arms & ammunition	93	37	-		-
Furniture, toys and other manufactures products	94 to 96	5,557	5,556		207
Works of art and not specified	97 to 99	79,701	-		-
Total per year		**470,536**	**208,910**	**112,815**	**9,319**

Table A-6-2: Summary – UAE demand for import from the West via IMEC

Product category group	HS Group	Demand for import from West USD millions	2024 TEU to West (40f = 2 TEU)	Number of trucks (truck = a 40f or a 20f container)
Animals; live	1			
Fresh food and vegetables; non-live, no-cereals	2 to 9	504	55,999	27,999
Cereals	10			
Processed food products, etc.	11 to 24	697	23,226	11,613
Stone, cement, ores, etc.	25 to 26	17	4,438	2,219
Oil & gas, fuels, chemicals	27 to 29			
Pharmaceutical products	30	691	3,454	1,727
Fertilizers	31	4	197	197
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	685	13,692	6,846
Explosives	36			
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	941	23,521	11,761
Textile, garments, footwear and related articles	50 to 67	467	10,385	5,192
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	86	6,905	3,452
Diamond, gold, Jewelery, etc.	71			
Metals and metal products of all kinds	72 to 83	482	24,092	12,046
Machinery, electrical products, equipment, etc.	84 to 86	3,602	40,025	20,013
Vehicles & ships, aircrafts, etc.	87 to 89			
Optical, measurement, musical instruments, etc.	90 to 92	936	4,680	4,680
Arms & ammunition	93			
Furniture, toys and other manufactures products	94 to 96	207	4,606	2,303
Works of art and not specified	97 to 99			
Total per year		**9,319**	**215,221**	**110,049**
TEU per workday	**769**			
Trucks per workday	**393**			

Table A-7-1: Total UAE exports, relevant categories and the demand for use of the IMEC route (2023 USD million)

Product category group	HS Group	World grand total (4)	World total Relevant	Total export to West Incl. irrelevant	Demand for export via IMEC
Animals; live	1	154			
Fresh food and vegetables; non-live, no-cereals	2 to 9	9,172	9,172		60
Cereals	10	245			
Processed food products, etc.	11 to 24	17,156	17,156		124
Stone, cement, ores, etc.	25 to 26	1,655	1,655		9
Oil & gas, fuels, chemicals	27 to 29	292,811			
Pharmaceutical products	30	3,419	3,419		31
Fertilizers	31	43	43		0
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	12,680	12,680		278
Explosives	36	16			
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	26,204	26,204		1,008
Textile, garments, footwear and related articles	50 to 67	15,185	15,185		230
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	2,269	2,269		57
Diamond, gold, Jewelry, etc.	71	125,655			
Metals and metal products of all kinds	72 to 83	26,396	26,396		960
Machinery, electrical products, equipment, etc.	84 to 86	127,214	127,214		3,193
Vehicles & ships, aircrafts, etc.	87 to 89	43,095	-		-
Optical, measurement, musical instruments, etc.	90 to 92	8,710	8,710		376
Arms & ammunition	93	24	-		-
Furniture, toys and other manufactures products	94 to 96	5,175	5,175		66
Works of art and not specified	97 to 99	19,954	-		-
Total per year		**737,229**	**255,277**	**82,291**	**6,390**

Table A-7-2: Summary – UAE demand for export to the West via IMEC

Product category group	HS Group	Demand for export to West USD millions	2024 TEU to West (40f = 2 TEU)	Number of trucks (truck = a 40f or a 20f container)
Animals; live	1			
Fresh food and vegetables; non-live, no-cereals	2 to 9	60	6,621	3,311
Cereals	10			
Processed food products, etc.	11 to 24	124	4,119	2,059
Stone, cement, ores, etc.	25 to 26	9	2,425	1,212
Oil & gas, fuels, chemicals	27 to 29			
Pharmaceutical products	30	31	154	77
Fertilizers	31	0	13	13
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	278	5,552	2,776
Explosives	36			
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	1,008	25,206	12,603
Textile, garments, footwear and related articles	50 to 67	230	5,103	2,552
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	57	4,550	2,275
Diamond, gold, Jewelry, etc.	71			
Metals and metal products of all kinds	72 to 83	960	48,021	24,010
Machinery, electrical products, equipment, etc.	84 to 86	3,193	35,476	17,738
Vehicles & ships, aircrafts, etc.	87 to 89			
Optical, measurement, musical instruments, etc.	90 to 92	376	1,878	1,878
Arms & ammunition	93			
Furniture, toys and other manufactures products	94 to 96	66	1,462	731
Works of art and not specified	97 to 99			
Total per year		**6,390**	**140,579**	**71,235**
TEU per workday	**502**			
Trucks per workday	**254**			

Jordanian present demand analysis (“First Circle“, 2023 figures)

Table A-8-1: Total Jordanian imports, relevant categories and the demand for use of the IMEC route (2023 USD million)

Product category group	HS Group	World grand total (4)	World total Relevant	Total import from West Incl. irrelevant	Demand for import via IMEC
Animals; live	1	291			
Fresh food and vegetables; non-live, no-cereals	2 to 9	1,569	1,569		398
Cereals	10	978	-		-
Processed food products, etc.	11 to 24	2,423	2,423		730
Stone, cement, ores, etc.	25 to 26	212	212		6
Oil & gas, fuels, chemicals	27 to 29	4,227	-		-
Pharmaceutical products	30	775	775		428
Fertilizers	31	72	72		9
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	602	602		198
Explosives	36	2	-		-
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	1,932	1,932		324
Textile, garments, footwear and related articles	50 to 67	1,701	1,701		79
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	361	361		45
Diamond, gold, Jewelry, etc.	71	1,741	-		-
Metals and metal products of all kinds	72 to 83	1,446	1,446		107
Machinery, electrical products, equipment, etc.	84 to 86	2,922	2,922		680
Vehicles & ships, aircrafts, etc.	87 to 89	2,498	-		-
Optical, measurement, musical instruments, etc.	90 to 92	390	390		193
Arms & ammunition	93	-	-		-
Furniture, toys and other manufactures products	94 to 96	329	329		56
Works of art and not specified	97 to 99	1,237	-		-
Total per year		**25,708**	**14,733**	**7,967**	**3,254**

Table A-8-2: Summary – Jordanian demand for import from the West via IMEC

Product category group	HS Group	Demand for import from West USD millions	2023 TEU from West (40f = 2 TEU)	Number of trucks (truck = a 40f or a 20f container)
Animals; live	1			
Fresh food and vegetables; non-live, no-cereals	2 to 9	398	44,253	22,126
Cereals	10		-	-
Processed food products, etc.	11 to 24	730	24,350	12,175
Stone, cement, ores, etc.	25 to 26	6	1,565	783
Oil & gas, fuels, chemicals	27 to 29		-	-
Pharmaceutical products	30	428	2,139	1,069
Fertilizers	31	9	472	472
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	198	3,958	1,979
Explosives	36		-	-
Chemical products, plastics & poly-mers, rubber, wood, pulp & paper, etc.	37 to 49	324	8,103	4,052
Textile, garments, footwear and related articles	50 to 67	79	1,746	873
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	45	3,577	1,789
Diamond, gold, Jewelry, etc.	71		-	-
Metals and metal products of all kinds	72 to 83	107	5,355	2,677
Machinery, electrical products, equip-ment, etc.	84 to 86	680	7,560	3,780
Vehicles & ships, aircrafts, etc.	87 to 89		-	-
Optical, measurement, musical instru-ments, etc.	90 to 92	193	965	965
Arms & ammunition	93		-	-
Furniture, toys and other manufac-tures products	94 to 96	56	1,253	627
Works of art and not specified	97 to 99		-	-
Total per year		**3,254**	**105,295**	**53,366**
TEU per workday	**376**			
Trucks per workday	**191**			

Table A-9-1: Total Jordanian exports, relevant categories and the demand for use of the IMEC route (2023 USD million)

Product category group	HS Group	World grand total (4)	World total Relevant	Total export to West Incl. irrelevant	Demand for export via IMEC
Animals; live	1	165			
Fresh food and vegetables; non-live, no-cereals	2 to 9	749	698		26
Cereals	10	3	-		-
Processed food products, etc.	11 to 24	838	786		83
Stone, cement, ores, etc.	25 to 26	1,005	979		49
Oil & gas, fuels, chemicals	27 to 29	1,674	-		-
Pharmaceutical products	30	798	736		61
Fertilizers	31	1,452	1,451		204
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	481	448		4
Explosives	36	0	-		-
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	800	635		13
Textile, garments, footwear and related articles	50 to 67	2,093	2,049		1,312
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	28	26		1
Diamond, gold, Jewelry, etc.	71	1,268	-		-
Metals and metal products of all kinds	72 to 83	630	533		46
Machinery, electrical products, equipment, etc.	84 to 86	772	560		125
Vehicles & ships, aircrafts, etc.	87 to 89	446	-		-
Optical, measurement, musical instruments, etc.	90 to 92	123	36		5
Arms & ammunition	93	-	-		-
Furniture, toys and other manufactures products	94 to 96	165	151		5
Works of art and not specified	97 to 99	39	-		-
Total per year		**13,529**	**9,087**	**4,095**	**1,933**

Table A-9-2: Summary – Jordanian demand for export to the West via IMEC

Product category group	HS Group	Demand for export to West USD million	2023 TEU to West (40f = 2 TEU)	Number of trucks (truck = a 40f or a 20f container)
Animals; live	1			
Fresh food and vegetables; non-live, no-cereals	2 to 9	26	2,888	1,444
Cereals	10		-	-
Processed food products, etc.	11 to 24	83	2,756	1,378
Stone, cement, ores, etc.	25 to 26	49	13,063	6,531
Oil & gas, fuels, chemicals	27 to 29		-	-
Pharmaceutical products	30	61	304	152
Fertilizers	31	204	10,182	10,182
Paints, cosmetics, perfumes, soap, glues, etc	32 to 35	4	84	42
Explosives	36		-	-
Chemical products, plastics & polymers, rubber, wood, pulp & paper, etc.	37 to 49	13	324	162
Textile, garments, footwear and related articles	50 to 67	1,312	29,149	14,574
Articles of stone, ceramics, cement, etc; and glass & glassware	68 to 70	1	54	27
Diamond, gold, Jewelry, etc.	71		-	-
Metals and metal products of all kinds	72 to 83	46	2,306	1,153
Machinery, electrical products, equipment, etc.	84 to 86	125	1,394	697
Vehicles & ships, aircrafts, etc.	87 to 89		-	-
Optical, measurement, musical instruments, etc.	90 to 92	5	23	23
Arms & ammunition	93		-	-
Furniture, toys and other manufactures products	94 to 96	5	117	59
Works of art and not specified	97 to 99		-	-
Total per year		**1,933**	**62,646**	**36,425**
TEU per workday	**224**			
Trucks per workday	**130**			

Notes: Irrelevant categories marked grey

"Second Circle": Short-term demand projected for 2027. if the Trump Plan for Gaza is implemented and relative political stability is achieved

End of the war in Gaza and relative political stability would enable:

- Further diversion of relevant UAE trade with Western markets from maritime routes to the IMEC route (usage of IMEC is assumed to grow from 15% to 20% of relevant trade)
- Start of use of IMEC route for European and American trade with relevant Arab and Asian "markets in the East", at a very modest usage rate of 1% of their relevant trade

Our estimates for the "Second Circle" demand in 2027 also assume that the total trade figures of trading countries in 2027 will be 10% higher on average than in 2023–2024.

Tables A-10-1 and A-10-2 present the estimated "Second Circle" demand for use of the Jordan River Crossing in 2027.

- Demand is expected to more than double, reaching approximately 3,000 trucks per workday (assuming a very modest usage rate of only 1% of relevant trade of "Western markets")
- Only 400 trucks per day of that demand are expected to be Israeli trade via the IMEC route. The remaining volume, approximately 2,500 trucks per day, will consist of transit trade moving through Israeli ports (West to East and East to West trade, combined).

Summary Table A-10-1: "Second Circle" 2027 demand for use of the Jordan River Crossing – USD millions

Direction of trade	Country & direction	Total export / import of country (2)	Total export / import by direction	Demand for Jor. River Crossing (1)	% demand of total direction
East to West	Israel imports from East	101,052	32,167	5,681	17.7%
	Jordan exports to West	14,882	4,504	2,127	47.2%
	United Arab Emirates exports to West (3)	810,952	90,520	9,372	10.4%
	EU countries import from East (4)	2,636,285	1,093,827	5,663	0.5%
	USA imports from East (4)	3,356,813	1,370,144	7,545	0.6%
	Other West countries import from East (4)	2,397,239	985,588	5,283	0.5%
	Total	**9,317,222**	**3,576,751**	**35,671**	**1.0%**
West to East	Israel exports to East	66,283	13,982	2,763	19.8%
	Jordan imports from West	28,279	8,764	3,579	40.8%
	United Arab Emirates imports from west (3)	517,590	124,096	13,667	11.0%
	EU countries exports to East (4)	2,760,013	640,050	3,525	0.6%
	USA exports to East (4)	2,063,803	583,849	3,215	0.6%
	Other West countries exports to East (4)	1,929,526	489,560	2,696	0.6%
	Total	**7,365,493**	**1,860,300**	**29,446**	**1.6%**
Total	**Israel**	**167,335**	**46,149**	**8,444**	**18.3%**
	Jordan	**43,160**	**13,268**	**5,706**	**43.0%**
	United Arab Emirates (3)	**1,328,541**	**214,616**	**23,040**	**10.7%**
	EU countries (4)	**5,396,298**	**1,733,877**	**9,187**	**0.5%**
	USA (4)	**5,420,615**	**1,953,992**	**10,760**	**0.6%**
	Other West countries (4)	**4,326,765**	**1,475,148**	**7,979**	**0.5%**
	Grand total	**16,682,715**	**5,437,051**	**65,117**	**1.2%**

Notes:

Relevant categories only, as per the estimated usage ratio of IMEC out of the total trade stream
10% increase on 2023 / 2024 figures
Usage ratio increases to 20%
Usage ratio of 1%

Summary Table A-10-2: "Second Circle" 2027 demand for use of the Jordan River Crossing – TEU per workday and trucks / workday

Direction of trade	Country & direction	TEU per workday	Trucks per workday
East to West	Israel imports from East	577	293
	Jordan exports to West	246	143
	United Arab Emirates exports to West	736	373
	EU countries imports from East	504	263
	USA imports from East	671	350
	Other West countries imports from East	470	245
	Total	3,204	1,667
West to East	Israel exports to East	162	101
	Jordan imports from West	414	210
	United Arab Emirates imports from West	1,127	576
	EU countries exports to East	314	164
	USA exports to East	286	149
	Other West countries exports to East	240	125
	Total	2,542	1,325
	Israel	738	393
Total	Jordan	660	353
	United Arab Emirates	1,864	950
	EU countries	817	426
	USA	957	499
	Other West countries	710	370
	Grand total	5,746	2,991

"Third Circle": Preliminary projections for demand expected to develop over the next three years, assuming continued political stability

Continued political stability would generate (a) further trade diversion from maritime routes to the IMEC route wherever it offers advantages in travel time and cost, and (b) trade expansion that the IMEC route is expected to generate, even though shipping via the IMEC route will still be by mainly by road-transportation (trucks), with partial use of the already operative railway lines in Israel, Saudi Arabia and the UAE.

The following preliminary analysis yields a rough estimate indicating that, under these assumptions, "Third Circle" demand may gradually increase to approximately 7,500 trucks per day, by 2029.

The drivers of such increase in demand are expected to be:

- **An increase in Israeli imports** and especially re-imports from the UAE, trade with Jordan, start of direct imports from Saudi Arabia, and a further increase in trade diversion with Asian markets (China, India, etc.) toward the IMEC route. The combined effect of these trends, along with the expansion of Israeli trade with Eastern markets, would more than double the demand for use of the Jordan River Crossing by Israeli trade to approximately 1,000 trucks per day.
- **Significant increase in the usage ratio of the IMEC route for trade between "Western markets" and India.** Our estimates for "Third Circle" demand assume an increased usage ratio for these East–West trade streams to approximately 5% of relevant trade. The usage ratio for trade between Western markets and China (and other Far East Asian markets) is assumed to increase to 2%–2.5% of relevant trade by 2029. These increases, combined with East–West trade growth, would raise demand for these trade streams at the Jordan River Crossing to approximately 5,000–6,000 trucks per workday.
- **A faster increase in IMEC route usage for trade between Western markets and GCC countries, as well as Iraq, alongside expansion of these trade streams.** With an expected usage ratio of around 10% for the trade between Western markets and non-UAE GCC countries, as well as Iraq, this trade would contribute over 1,000 trucks per day to the demand at the Jordan River Crossing.

Overall, the 2029 forecast projects demand at the Jordan River Crossing of over 1,000 trucks per workday for Israeli trade (imports and exports) with all Eastern markets, and more than 6,000 trucks per day for transit trade through Israel.

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