Emerging Markets
Creating Access to New Opportunities
Emerging markets are driving global growth

Emerging markets are growing three times faster than the world’s developed economies. They are both major export hubs and new centers of consumer spending. McKinsey & Company reports that by 2025, annual consumption in emerging economies will rise to $30 trillion - nearly half the global total.

Agility helps customers tap into a changing global economy

Agility is a world leader in emerging market logistics, serving major multi-nationals that are expanding their international footprint, and helping small and medium enterprises as they tap into growing consumer demand in these dynamic markets.
Agility got its start as a local warehousing company in Kuwait, transformed itself into a regional logistics provider in the Middle East, then expanded its footprint to become a global supply chain services leader with a network in more than 100 countries. Today, Agility is one of the few industry leaders with roots outside Europe and the United States. Its heritage gives it a unique perspective on the challenges companies face in emerging markets.

Agility emphasizes on-the-ground decision making and local knowledge. Agility knows not all emerging markets are the same. Its advantage is recognizing and understanding the things that distinguish different markets. The Agility culture gives local management the flexibility to act fast and make decisions that are critical in fluid operating environments. Agility develops and relies on local talent and teams with intimate knowledge of the logistics and regulatory landscape.

Agility is one of the only industry leaders with roots in an emerging market

It’s about experience. Agility was built on emerging markets business.

Over 20,000 employees in more than 100 countries, empowered local management. Agility is a publicly listed company on the Kuwait Stock Exchange and Dubai Financial Market.

The Agility network connects emerging economies to the global economy
Agility manages uncertainty and reduces risk in emerging markets

Emerging markets logistics can be challenging, so selecting the right logistics partner is critical. Agility helps customers mitigate the risks of working in emerging markets.

**Customer Challenges Working in Emerging Markets**

- Dense, ambiguous, or inconsistently applied regulations, complex bureaucratic processes, delays at customs
- Connectivity challenges related to infrastructure
- Ever-present need for talented, professional, and customer-oriented human resources
- Security considerations, supply chain resilience in parts of the world that are often at higher risk for natural disasters or political change
- Challenges of managing a diverse set of suppliers
- Fast-changing cost structures, escalating labor and property prices
- Strained capacity
- Finding a logistics partner who truly “gets it” – not just during the good times, but also when things get tough

**How Agility Reduces Risk**

- Strong understanding of local regulations and relationships with local authorities. Proactive approach to securing correct documentation in advance. Committed to compliance with international regulations like the Foreign Corrupt Practices Act (FCPA) and UK Bribery Act (UKBA)
- Creativity in finding effective routes and modes of transport to move goods
- Experienced logistics professionals with a strong understanding of the local market
- A safety-oriented approach, and ability to respond quickly to external events to minimize disruptions
- Strong supplier relationships, project management capabilities, and systems and technology support
- Well-established network in emerging markets, commitment to helping customers manage costs, and proven ability to provide innovative solutions
- Existing investments in capacity, strong local relationships to scale as needed, and track record of “building to suit” investments for major customers
- Can-do attitude, flexibility in tailoring solutions to individual customer needs, and a deeply held belief in personal service
BRICs, frontier markets and other fast-growing economies: Agility is there

Agility invested billions to build and acquire the assets that make it a logistics leader today in the Middle East, Asia Pacific, Latin America, Eastern Europe and Africa.

Agility’s commitment has helped it grow to be one of the five largest logistics players in China, where it operates an extensive domestic distribution network and handles huge export volumes. In India, Agility is one of the industry’s top three providers, combining a vast domestic footprint with cross-border forwarding capabilities. Agility ranks in the top five forwarders in Brazil and has a strong presence in oil and gas logistics in Russia. Agility is the largest integrated logistics provider in the Middle East.

Agility has invested heavily in the next generation of high-growth markets and built a solid foundation in vibrant frontier markets.
Agility has an unmatched record of performance in challenging environments

Agility leads in environments where others are reluctant to operate. It has delivered outstanding operational performance in war zones such as Iraq, disaster zones such as Haiti, and areas with little infrastructure such as Papua New Guinea. Agility has brought state-of-the-art operations to frontier markets such as Pakistan.

Protecting the world’s supply of hard drives from flood waters in Thailand

Severe flooding in Thailand in 2011 jeopardized production for one of the world’s leading hard drives manufacturers, an Agility customer since 2000. As the waters rose, Agility teams began moving goods for the customer and its vendors to Agility customs-licensed warehouses located within a free zone inside a flood embankment 70 kilometers away. Agility worked with the customer on a plan to slow and then halt production at the main facility and move machines, parts and goods out before the water reached them. The first challenge was to streamline the supply chain by kitting parts and transporting them to hard disk drive production lines in three other locations. After the customer shut down production, it needed to move heavy machinery to a maintenance facility in another province. Parts and machinery left inside the factory were submerged in two meters of water and could only be reached and lifted through use of pontoons. Agility floated the equipment out of the factory and onto trucks, returning the machinery once the floodwaters subsided.

Delivering one million meals a day in Iraq

Agility set the standard for performance-based logistics in a wartime environment with more than seven years of exceptional execution on the largest-ever U.S. military subsistence contract. In Iraq and Kuwait, the company provided assets, systems, expertise and resources that allowed it to deliver one million meals a day at peak. Agility made more than 140,000 deliveries and managed a supply chain that extended throughout Iraq. The company achieved a 99% fill rate with 99% inventory accuracy over seven years, cutting cost, eliminating waste, reducing turnaround time and lowering manpower requirements for its government customer.

Reinforcing roads in Siberia to move 150-ton cement mills

To relocate a cement plant from Germany to western Siberia, Agility directed movement of more than 17 charter vessels and oversaw reinforcement of local transportation infrastructure. The move included relocation of two 150-ton cement mills. The movements required bridge reinforcement, construction of new roads and the lifting of more than 200 power lines.

Moving fuel by barge in Africa during the rainy season

Fuel is a vital necessity in humanitarian relief operations in Africa. However, poor infrastructure exacerbated by rainy seasons makes fuel near impossible to be transported at certain times of the year. Agility, therefore, uses river barges to reach remote locations when roads are inaccessible, ensuring that over 20 customer sites are continuously supplied with the diesel and jet aviation fuel that powers their relief operation.
Helping a customer in Mexico rebuild after a crisis

The 2007 housing market collapse greatly affected one of Agility’s customers, Mexico’s global cement and building materials giant. During the crisis, Agility was successful in solidifying the relationship by getting better market rates, offering better contracts and rates for the destination changes through Agility’s global partners, offering extended credit terms for international freight, and creating cost reductions throughout the customer’s logistics operations. Today, Agility manages the customer’s entire supply chain with staff stationed in-house throughout the customer’s procurement, projects and technology departments.

Linking Indian pharmaceutical giant to new export markets in the West

An Indian pharmaceutical maker partnered with Agility to break into the highly competitive European market. Agility provides temperature-controlled warehousing for this customer in Hyderabad and manages its exports and ocean freight from India to the UK, Spain, Romania and the United States. Agility designed processes that helped this customer obtain critical certification required to move sensitive cargo.

Consolidating national distribution centers into a state-of-the-art regional pharmaceutical hub in the United Arab Emirates

Agility’s state-of-the-art, temperature-controlled, bonded facility in Dubai has transformed the Middle East pharmaceutical industry by giving leading global drugmakers a safer, more reliable, more efficient means of distribution. The Agility warehouse handles inbound and outbound cargo, providing secure storage of sensitive materials in multiple temperature ranges.

Meeting sharp rise in automotive demand in Brazil with dedicated, in-house logistics team

Agility works with a large automotive group to help it keep pace with the growing demand in the Brazilian automotive market. Twenty-two Agility employees manage the manufacturer’s supply chain in-house at the customer’s facilities, where they handle shipments that feed production lines and coordinate with global suppliers. Agility manages a global supply chain that sees parts and materials shipments picked up each morning in Europe, for delivery to the customer’s production lines by the following afternoon. By operating inside the customer’s facility, the Agility team is able to help its customer make strategic decisions to shape its supply chain for the greatest efficiency and cost savings today and for years to come.

Agility’s experience in emerging markets hubs gives customers an advantage when moving goods

Emerging economies account for 48% of global productivity and nearly two-thirds of the growth in global output, according to the IMF.
Agility facilitates trade between fast-growing emerging markets

Intra-Asia trade accounts for more than 50% of total Asian trade and almost one-third of total global trade. Trade between Asia, Latin America, Africa and the Middle East has grown at double digit rates.

Agility pioneered road freight transportation across the ASIAN region by developing an integrated trucking network that links major cities, ports and airports to one another and to major destinations in China. Agility gives customers the flexibility of new routes, visibility, security, additional capacity and the option of combined land, air and sea transportation for raw materials and finished goods.

Regular road service connects Vietnam and Cambodia with Malaysia, Singapore, Laos and Thailand, offering customers up to 40% savings compared with air freight. In addition to offering transportation within the region, Agility offers customers a truck-air solution when faced with air export capacity bottlenecks in Southeast Asia. Agility’s fleet is equipped with the latest GPS technology and in-container cameras connected to a command center in Bangkok.

Agility converted an 18,000-square-meter warehouse in the UAE’s Jebel Ali Free Zone into a regional distribution hub for a leading automotive manufacturer. Agility helps the customer supply more than 24,000 different parts to over 40 different markets from a hub configured to meet the customer’s global standards. The facility is integrated into the customer’s IT systems and Agility’s warehouse management systems to provide inbound clearance, haulage and outbound distribution.

Agility manages the supply of products from the point of order for one of the largest direct sellers of quality skin care and cosmetics. Utilizing its extensive local knowledge, Agility offers warehousing, qualitative and quantitative inspection, scanning of incoming and outgoing goods down to the SKU-level and an island-wide distribution network in East Malaysia and Singapore.

Agility manages the unique and high-volume global supply chain of one of the world’s largest fashion retailers. Handling 11 origins across four countries, exporting to four destinations, with more than 300 suppliers, Agility successfully delivers 10 million kilograms of air freight and 10,000 cubic meters of ocean freight annually. Even with demanding lead times for sourcing and distribution of finished products from diverse suppliers across the Indian Subcontinent, Agility ensures that its customer’s stores are refreshed each week with new styles – on time and on budget.
Agility is a market leader in emerging economies with fast-growing consumer demand

Export manufacturing has lifted incomes and living standards in emerging markets and created demand for consumer goods. Yet according to McKinsey & Company, the largest companies from the developed world get only 17 percent of their revenues from these new markets today. Agility can help bridge that opportunity gap.

Managing distribution and reverse logistics for a leading sports apparel retailer in Indonesia

Agility set up a dedicated facility and team in Jakarta to redesign a leading sports apparel retailer’s distribution system there and manage the supply of products from the point of order. The new system allows Agility to work with the customer’s order management system to ensure visibility of products at the SKU-level throughout the supply chain.

After goods arrive at the warehouse, Agility takes orders from the customer, processes them, then picks and packs goods for delivery. Agility systems provide order visibility and product tracking. Agility uses a dedicated fleet and preferred vendors to ensure reliable delivery and works with Agility branch offices to deliver to remote retail locations across the Indonesian archipelago. The customer relies on Agility to reduce its environmental impact by reusing cartons, a program being extended to include collection and reuse of cartons from retail outlets. Agility handles the customer’s reverse logistics, managing the collection and return of any defective or recalled goods.

Managing distribution in Pakistan for a consumer goods giant

Agility is one of Pakistan’s largest 3PL providers, offering state-of-the-art warehousing and distribution facilities. Agility operates a 20,000-square meter warehouse in Karachi to manage distribution for a global consumer goods giant. The customer counts on Agility for warehouse services, including receiving and inventory control of raw material and finished products. The facility - equipped with warehouse management systems and handling equipment - guarantees efficient management of the customer’s products and distribution throughout the country. Agility also provides value-added services such as packing, handling and labeling.

Serving 150 cities across China

Agility’s powerful domestic transportation network offers nationwide and regional long-haul services to 150 cities across China. The Agility network connects China’s high-growth Yangtze River Delta, Pearl River Delta and Bohai Bay regions to one another and to inland and western China using a dedicated Agility fleet and contracted vehicles. Agility owns more than 200,000 square meters of warehouse storage in China.

Consolidating air cargo to cut costs and emissions for global telecommunications leader

Agility partnered with a global telecommunications provider on creating a “Goods in Transit Center” (GIT-C) that reduces air cargo weight, transport costs, and carbon emissions on shipments originating in mainland China and Hong Kong, destined to India. Agility packs consumer electronics cargo more densely on air pallets to reduce volumes and improve efficiencies in the use of aircraft. This reduces packaging, the number of pallets used, and “dead space” on planes. In order to make this happen, Agility modified its web-based tracking system to get a clear view of the customer’s shipping schedule and inventory, including the physical makeup of customer consignments, including weight, size, and handling requirements; and set up dedicated teams and facilities to manage operations. GIT-C saves 6% or more on cargo weight and CO2 emissions – which translates to a big boost to the customer’s bottom line.
Agility mobilizes resources across its complementary businesses to build powerful solutions

Dedicated and experienced global teams stand ready to tackle the complex and difficult challenges unique to highly specialized, service-sensitive areas like project, chemicals, and exhibition logistics.

Agility is able to combine freight forwarding and logistics services with specialized capabilities in large-scale, heavy-lift project logistics; logistics for customers in the chemical, petrochemical, polymer, bio fuels and oil sectors; and fairs and events logistics.

Building chemicals mega-hubs in China

Agility designed and built a manufacturing and logistics hub in Shanghai for a leading provider of plastics solutions. The 66,000-square-meter hub is designed to distribute up to 600,000 tons of plastic polymers imported from the Middle East. Agility designed and owns the hub, which was built to manage operations and distribution for its client’s customers in Asia over the coming decade.

Agility is the exclusive logistics partner for a China megahub under development by a leading German consumer brand company. Agility is providing inbound logistics warehousing of raw material and finished goods, production supply and clearance, and outbound logistics. The new hub will allow the customer to streamline manufacturing in China and position it for growth over the next decade.

Gas compressor station move from China and Italy to Uzbekistan

Armed with only coordinates to a remote destination in Uzbekistan, Agility employees in Italy, China and Kazakhstan were still able to deliver 6,000 cubic meters of heavy equipment on time and on budget. Half of the goods were moved from China and the other half from Italy to the site of a gas compressor station forming part of a new gas line under construction between Turkmenistan and China. Most of the items were out-of-gauge and needed special planning and handling. The station was in a deserted area, and the last miles of the journey were over dirt roads. All cargo delivered from Italy had to transit the River Volga before it froze for the winter. This required an experienced project logistics partner with in-depth knowledge of local conditions in this emerging market.

International freight management in Papua New Guinea

Agility provided all international and local freight management for oil and gas equipment destined for a major liquid natural gas facility in Papua New Guinea. The project will transport natural gas from Papua New Guinea gas fields through a 440-mile pipeline. Agility coordinates all of the land, ocean and air freight services, including tracking and customs clearance.

Managing cold chain logistics for a world expo

Agility Fairs & Events was the sole provider of cold chain logistics during a six-month world expo in China. Agility provided a full range of transportation and storage services at the expo. Agility’s cold chain logistics services ensured that products shipped from within or outside China reached the expo site as required.

With an average of 400,000 daily visitors and a peak of one million visitors on a single day, there was exceptional demand for chilled and frozen products and food in all of the expo’s on-site restaurants. Using 300 temperature-controlled trucks, Agility made more than 200 deliveries per day throughout the event. Agility ensured the safety and hygiene of all products and saw to it that supply matched demand for all food and beverage needs.
Agility invests in communities and builds strong relationships with local governments and suppliers.

In emerging markets, Agility recognizes the importance of developing strong, ethical relationships with local authorities and gaining insights into regulations and rules that govern business. Good relationships with local suppliers allow us to scale up and scale out to meet changing customer needs without taking on added cost or affecting performance.

Responding to natural disasters around the world

Agility partners with other private sector companies to assist humanitarian agencies in disaster response. Agility employees deploy with and support Logistics Emergency Teams that operate under the direction of the United Nations and respond to global disasters. Agility has contributed to the relief efforts in 22 natural disasters, including recent catastrophes in Chile, Haiti, China, Myanmar, Indonesia, Philippines, Bangladesh, Lebanon, Sri Lanka and Pakistan.

Investing in 600 community projects in more than 60 countries

Agility has invested in education and social welfare in its communities, building schools, funding youth projects, cleaning up the environment, supporting health initiatives and encouraging employee volunteer efforts. Recent examples:

- Building schools in Siem Reap, Cambodia. The schools operate to educate preschool-age children but also incorporate a mothers’ education program to raise awareness about the importance of health, nutrition and early childhood development.
- Construction of a school outside Kabul, Afghanistan, where 400 boys and girls are taught.
- Partnering with two non-profits to build a school in rural Indonesia that will accommodate 300 children.
- Partnering with a non-profit organization in Jordan to deliver food to poor families. Agility has distributed more than 4,000 packages of food. Agility has also sponsored a children’s lunch program for a school of 200.

Upholding high ethical standards

Agility’s uncompromising commitment to integrity, fairness and accountability is reinforced at all levels of the organization. Agility sets high standards in its Code of Business Ethics and Conduct, trains its employees, and empowers the reporting of ethical concerns through an anonymous alert line and other systems. Agility is also a signatory of the World Economic Forum’s Partnering against Corruption Initiative (PACI).

Raising environmental awareness

Agility is committed to mitigating environmental impact both in its own internal operations and in partnership with customers. Agility can help customers measure their carbon emissions, build more efficient supply chains, and partner to reduce packaging waste. Internally, Agility has launched an environmental awareness campaign to educate employees about how to think and act green. Agility focuses on reducing energy consumption in offices and operations, incorporating sustainable design features into major warehousing facilities, and recycling and reusing waste.
Agility Emerging Markets Logistics Index

The annual Agility Emerging Markets Logistics Index gives customers insights into the strengths and weaknesses of individual markets, and the factors behind the growth in the most explosive markets.
Contact us for more information

Global
Paul Mullins
Tel. +41.41.766.52.73
pmullins@agilitylogistics.com

Americas
Nevino Rocco
Tel. +1.714.617.6403
nrocco@agilitylogistics.com

Asia Pacific
Jens Wessel
Tel. +65.646.39881
jwessel@agilitylogistics.com

Europe
Leif Kronkvist
Tel. +41.61.316.5219
l kronkvist@agilitylogistics.com

Middle East & Africa
Mohammed Esa
Tel. +971.4.8131446
mesa@agilitylogistics.com

Chemicals
Neil Moon
Tel. +44.1642.438330
nmoon@agilitylogistics.com

Fairs & Events
Priscilla Leong
Tel. +65.6571.5618
pleong@agilitylogistics.com

Project Logistics
Franziska Inman
Tel. +1.713.452.3846
finman@agilitylogistics.com

For a full listing of offices and services offered across Agility’s global network, please visit our worldwide directory: www.agilitylogistics.com/directory.

www.agilitylogistics.com