Agility

2022 Emerging Markets Logistics Index

Optimistic 2022 Economic Outlook

*What logistics professionals expect in the year ahead**

29.7% strong to moderate global growth

20.3% recession unlikely

12.6% little or no chance of recession

20.9% recession likely

8.5% recession certain

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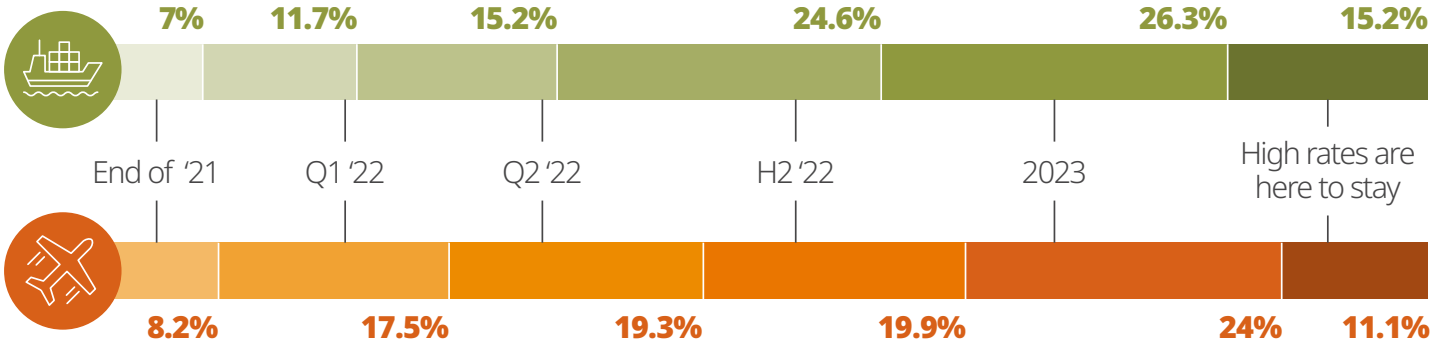
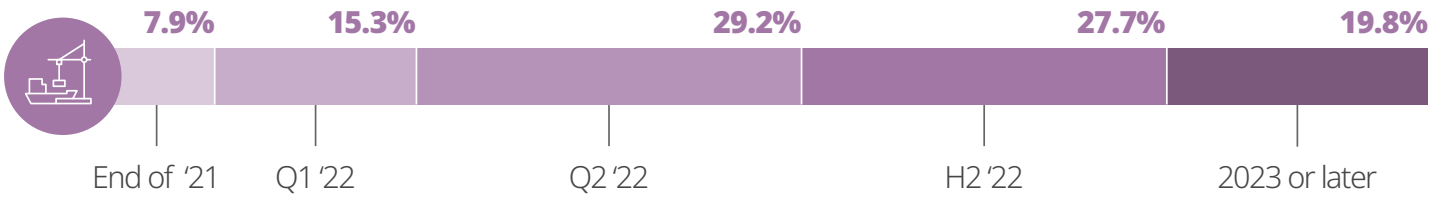
Supply Chain Disruption & High Rates

*When will freight rates normalize?**



*When will port congestion unwind?**



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What's Roiling the Supply Chain*

28.8% pandemic closures, congestion

23.8% container shortages

13.1% carrier capacity management

8.7% port infrastructure

7.7% overheated global economy

7.6% carrier price gouging

4.9% e-commerce acceleration

3.5% driver shortage

1.8% warehousing shortage

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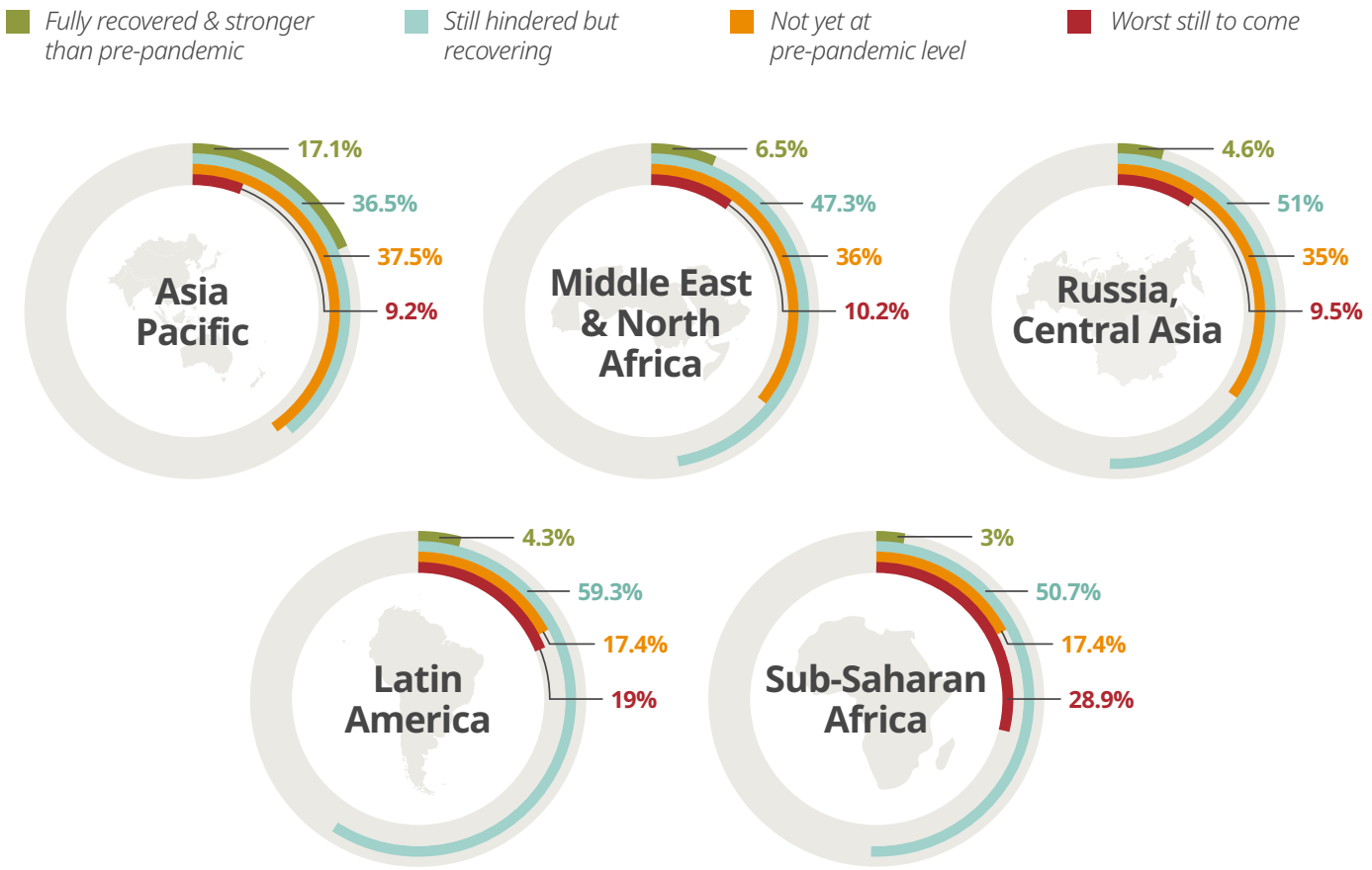
Where Recovery is Strongest

*What's the status of the regional economies that are home to emerging markets?**



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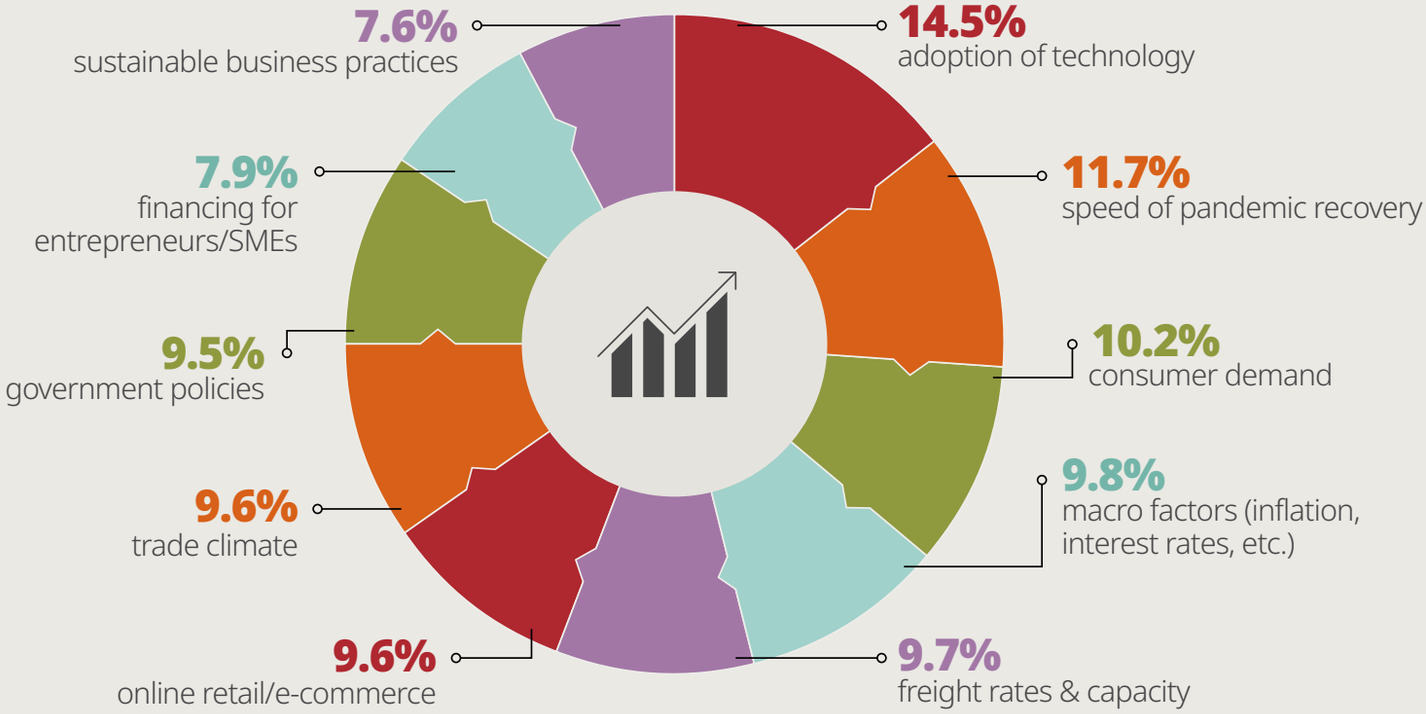
Growth Drivers in the Coming Decade

*Factors that will drive economic and business growth in emerging markets**



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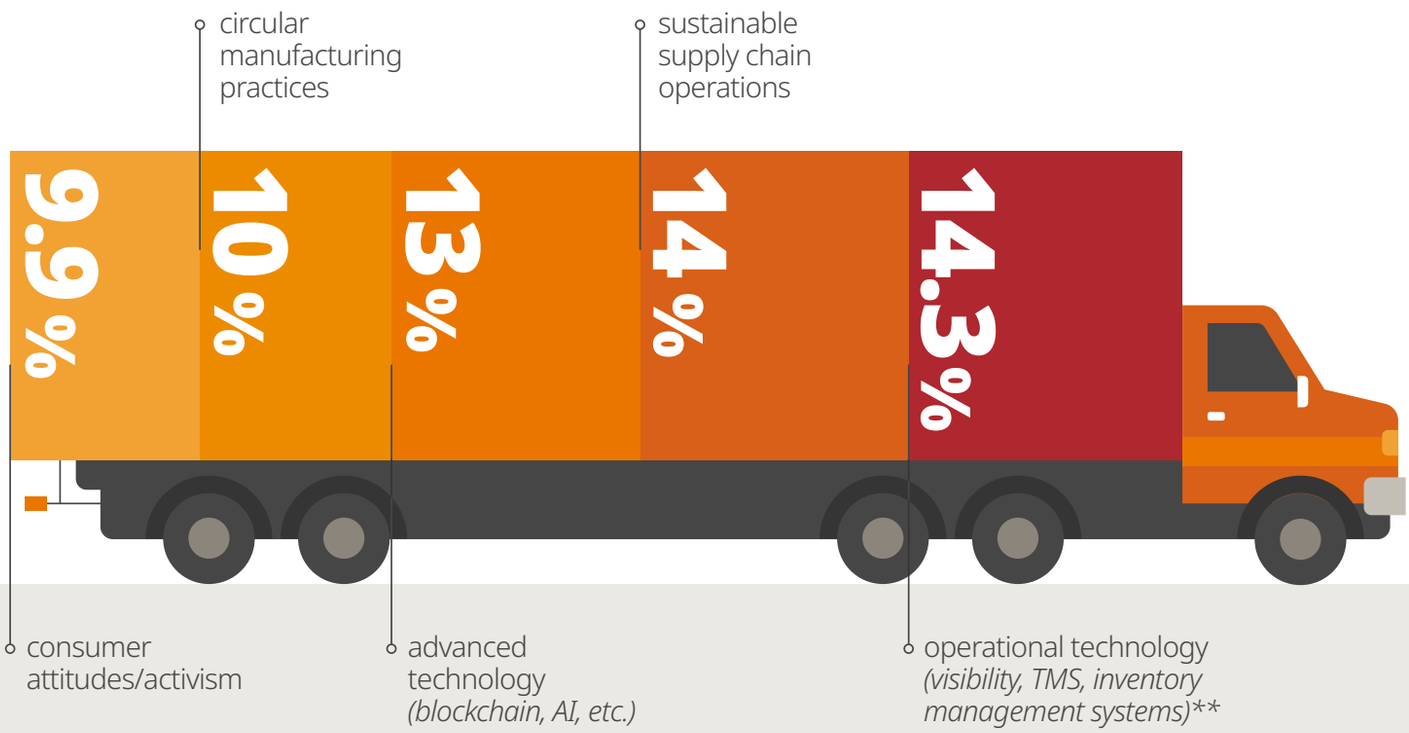
Logistics Industry Focus Areas in 2022 and Beyond*



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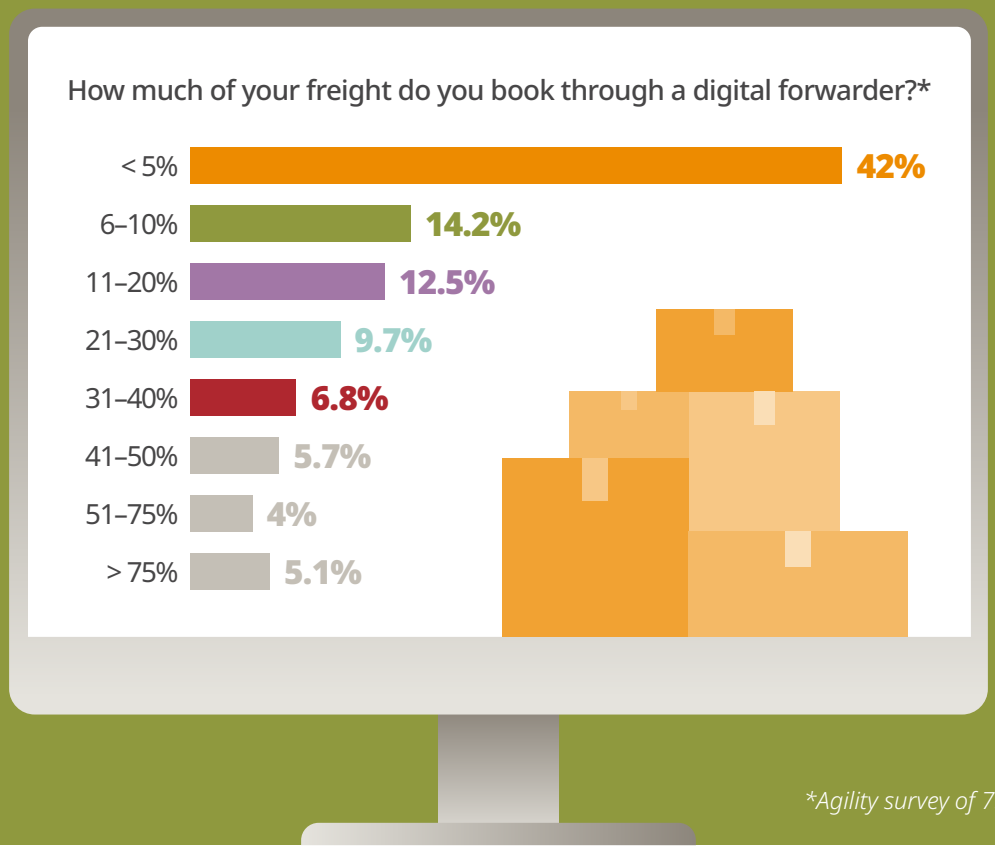
**38.3% answered "other"

Shippers Still Wary of Digital Forwarding



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Environmental Sustainability in Emerging Markets

*Does your company have environmental policies specific to emerging markets operations?**

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Top 10 Emerging Markets in 2022*

2022 Rank	Change from 2021

1	China	–
2	India	–
3	UAE	▲ 1
4	Malaysia	▲ 1
5	Indonesia	▼ 2
6	Saudi Arabia	–
7	Qatar	▲ 2
8	Thailand	▲ 3
9	Mexico	▼ 2
10	Turkey**	–

*2022 Index rankings include Digital Readiness (25% of overall ranking) for first time
**Results tabulated before crash of Turkish lira in late 2021

Top Domestic Logistics Markets

1. China
2. India
3. Indonesia
4. Qatar
5. UAE

Top International Logistics Markets

1. China
2. India
3. Mexico
4. Vietnam
5. Thailand

Best Business Fundamentals

1. UAE
2. Malaysia
3. Saudi Arabia
4. Qatar
5. Bahrain

Who is Digitally Ready?

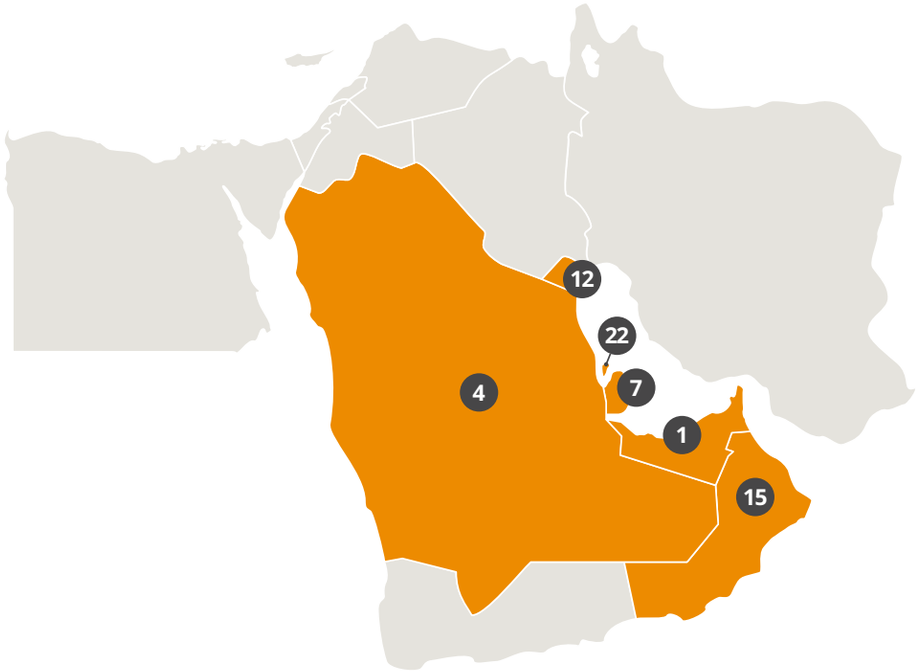
Emerging markets that lead in "new economy" areas like digital skills, e-commerce, sustainability, and support for startups and innovators

1	UAE
2	Malaysia
3	China
4	Saudi Arabia
5	India
6	Thailand
7	Qatar
8	Indonesia
9	Chile
10	Philippines

Digitally ready in the GCC

*How GCC states rank for digital readiness**

1	**UAE**
4	**Saudi Arabia**
7	**Qatar**
12	Kuwait
15	Oman
22	Bahrain



Out of 50 countries in the 2022 Agility Emerging Markets Logistics Index

Digitally ready in Asia

*How Asian countries rank for digital readiness**

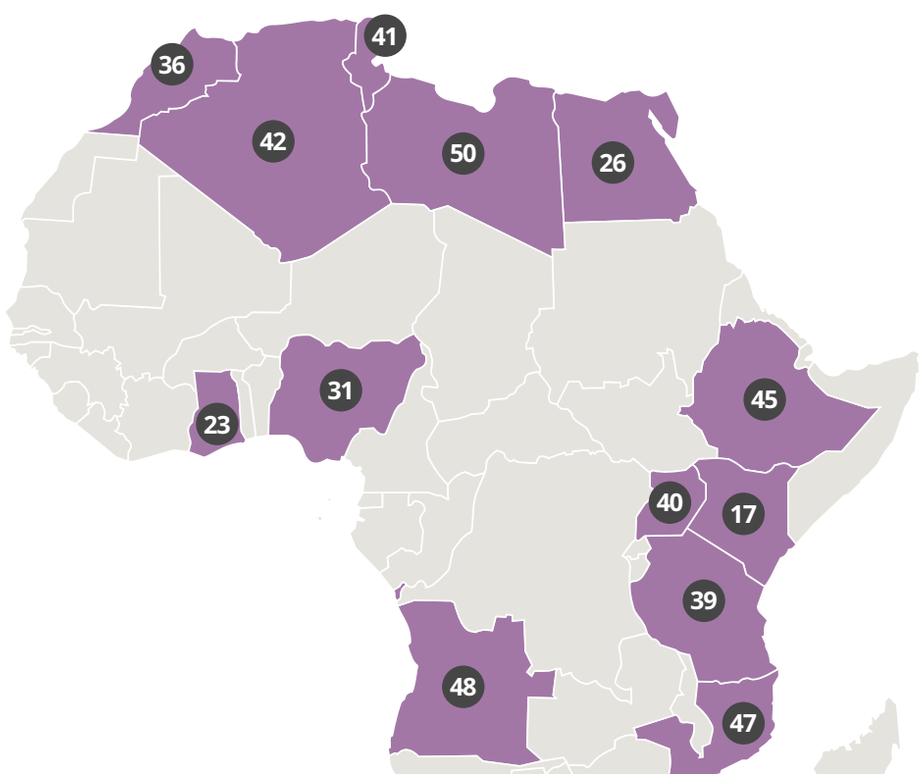
2	**Malaysia**
3	**China**
5	**India**
6	Thailand
8	Indonesia
10	Philippines
14	Vietnam
24	Pakistan
28	Kazakhstan
30	Sri Lanka
34	Bangladesh
37	Cambodia
49	Myanmar

**Out of 50 countries in the 2022 Agility Emerging Markets Logistics Index (UAE was No. 1)*

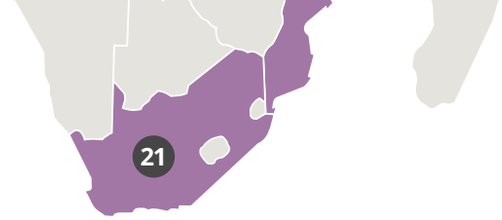
Digitally ready in Africa

*How African countries rank for digital readiness**

17	**Kenya**
21	**South Africa**
23	**Ghana**
26	Egypt
31	Nigeria
36	Morocco
39	Tanzania
40	Uganda
41	Tunisia
42	Algeria
45	Ethiopia



47	Mozambique
48	Angola
50	Libya



Out of 50 countries in the 2022 Agility Emerging Markets Logistics Index (UAE was No. 1)

Ghana – Moving Up Fast

Ghana moved up in all three categories and performed relatively well in digital readiness

Domestic Logistics
Up 2 spots to #36

Int'l Logistics
Up 8 spots to #37

Business Climate
Up 4 spots to #28

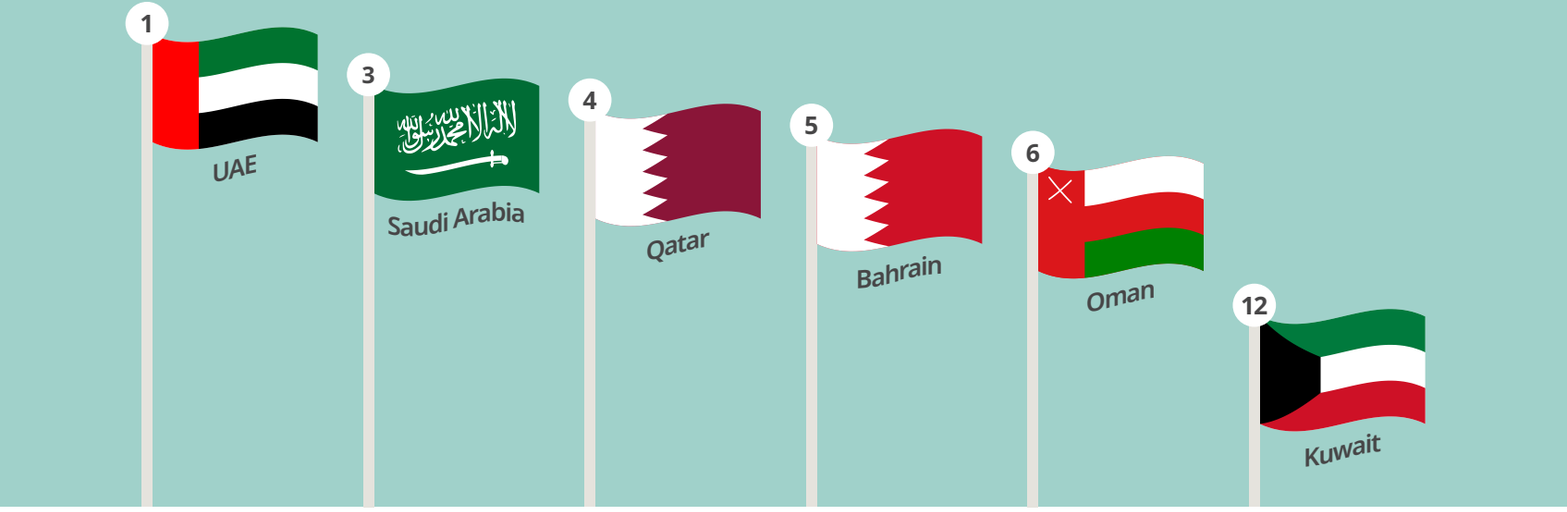
Digital Readiness
*#32**

Overall
Up 8 spots to #32

*New category for 2022

Gulf Still Strongest in Business Fundamentals

Gulf countries dominate the rankings for best overall business climate and fundamentals



Climbing the Rankings

Losing Ground in Key Areas

Domestic Logistics

Climbing the Rankings		Losing Ground in Key Areas	
15 Iran	▲ 7	▼ 8	Ethiopia 48
41 Venezuela	▲ 7	▼ 4	Malaysia 9
23 Chile	▲ 4	▼ 3	Uruguay 28

International Logistics

Climbing the Rankings		Losing Ground in Key Areas	
37 Ghana	▲ 8	▼ 15	Myanmar 45
27 Ecuador	▲ 6	▼ 9	Libya 50
39 Mozambique	▲ 5	▼ 3	Brazil 12

Business Climate

Climbing the Rankings		Losing Ground in Key Areas	
35 Iran	▲ 8	▼ 6	Uganda 41
24 Algeria	▲ 6	▼ 6	Nigeria 46
Tunisia, Ghana, Pakistan, Paraguay	▲ 5	▼ 6	Peru 29