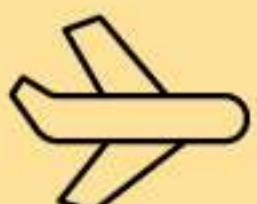
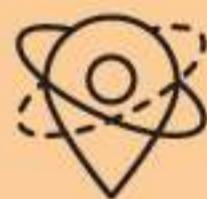


2026 Agility Emerging Markets Index

Highlights



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Outlook for 2026: Volatile

Do you expect more or less volatility in the global economy in 2026?

14.4%

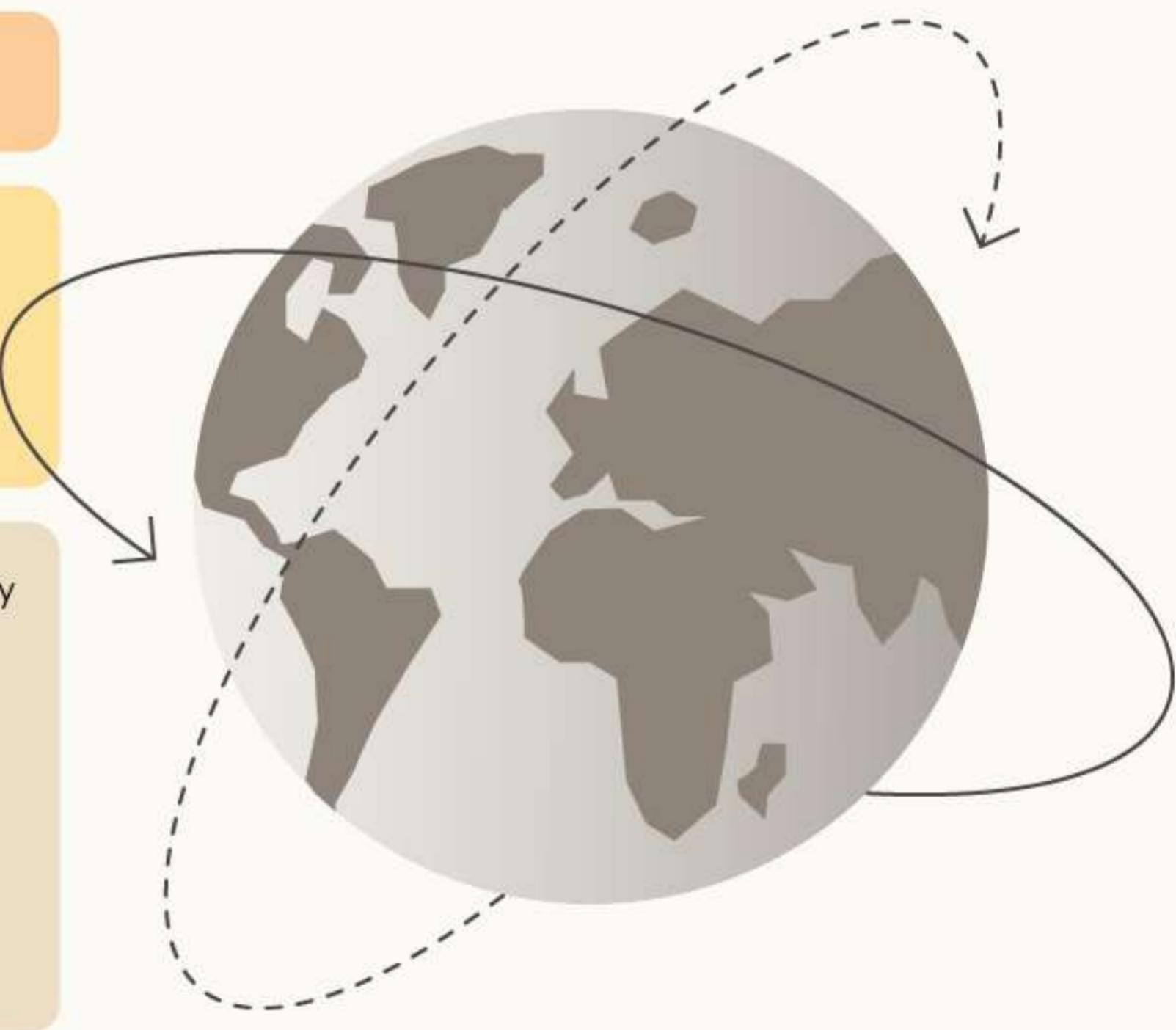
I expect less volatility next year

31.0%

Volatility is the new normal and is here to stay

54.6%

I expect more volatility over the next year, but believe things will stabilize in the medium term



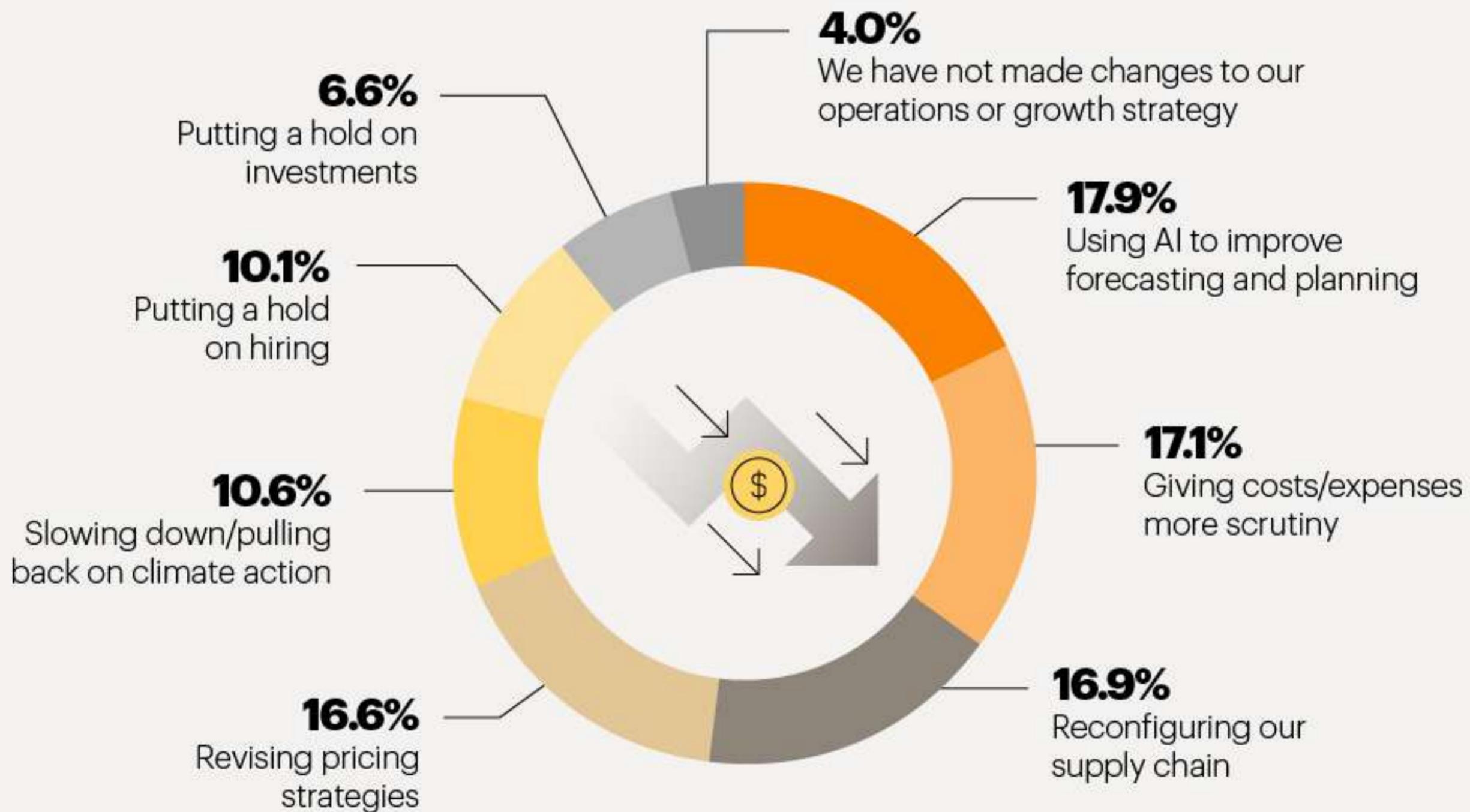
*Agility survey of 503 business executives



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How Companies are Managing Volatility

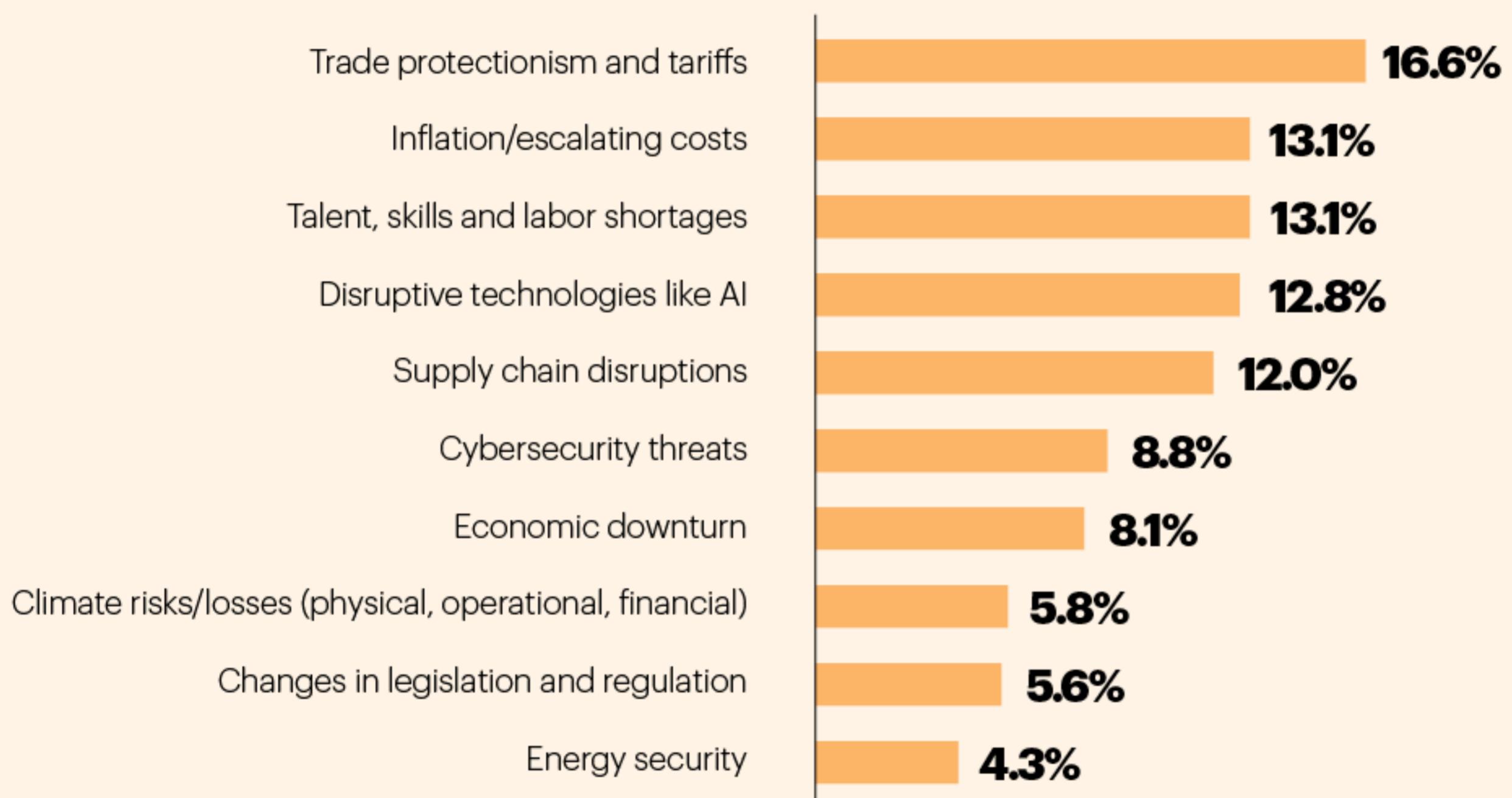
How is your company responding to volatility?



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Risks Companies Say They Aren't Prepared For



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Companies' Highest Priorities in 2026



19.6%

Improving supply chain resilience



19.5%

Protecting margins



15.1%

Driving growth



14.3%

Environmental sustainability



14.3%

Deploying technologies and AI



11.9%

Reducing costs



4.8%

Acquisitions and partnerships



0.5%

None of the above

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Dealing with Higher Costs & Tariffs

What are companies doing to cope with cost increases?

Supplier diversification	25.7%
Freight consolidation	21.8%
Strategic warehouses	19.4%
Leveraging trade frameworks	19.0%
Shifting production facilities	7.8%
Tariff engineering	6.4%

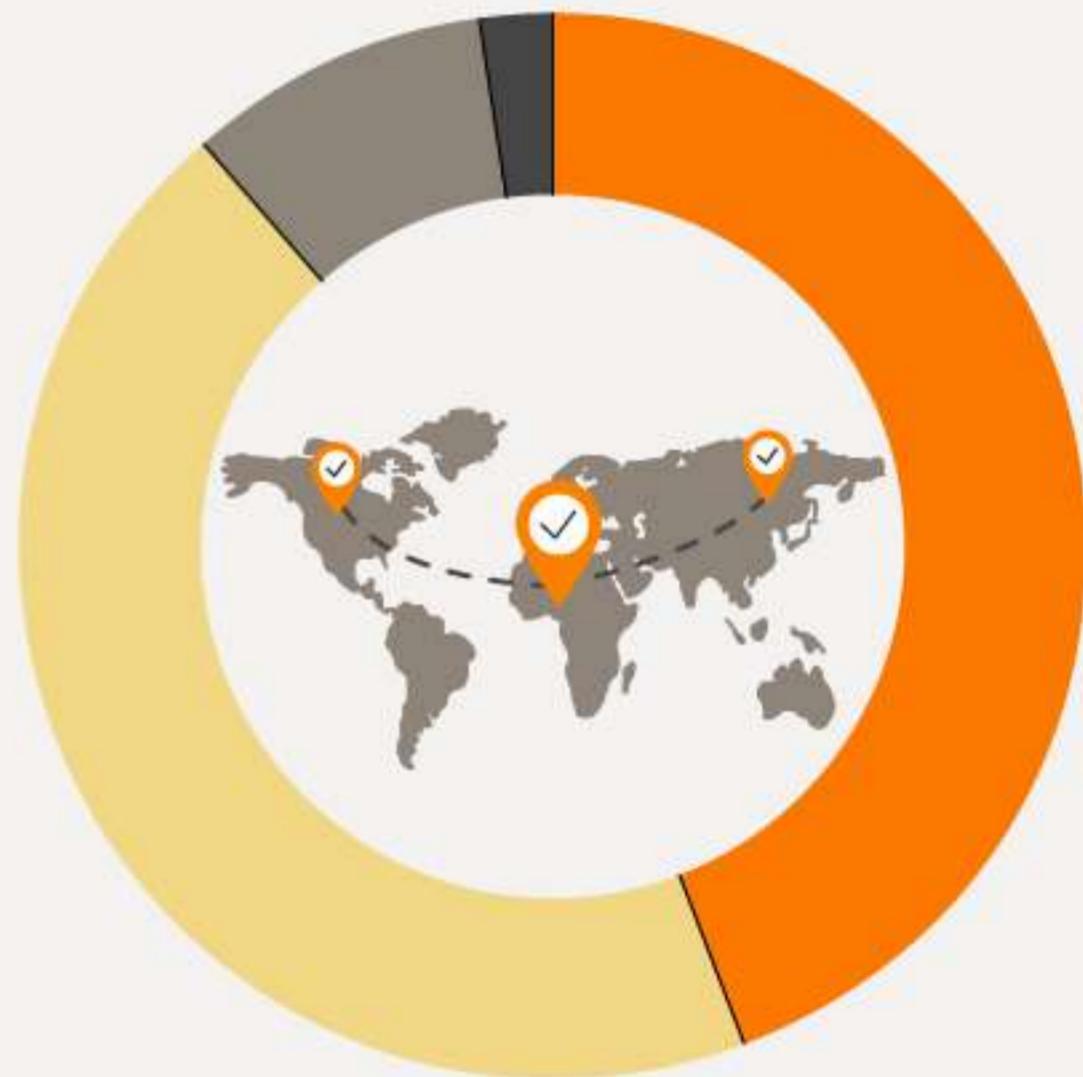


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Supply Chain Transformation

Will your supply chain be more localized, regionalized or globalized in 5 years?

● Globalized	44.4%
● Regionalized	44.4%
● Localized	9.3%
● Stay the same	2.0%

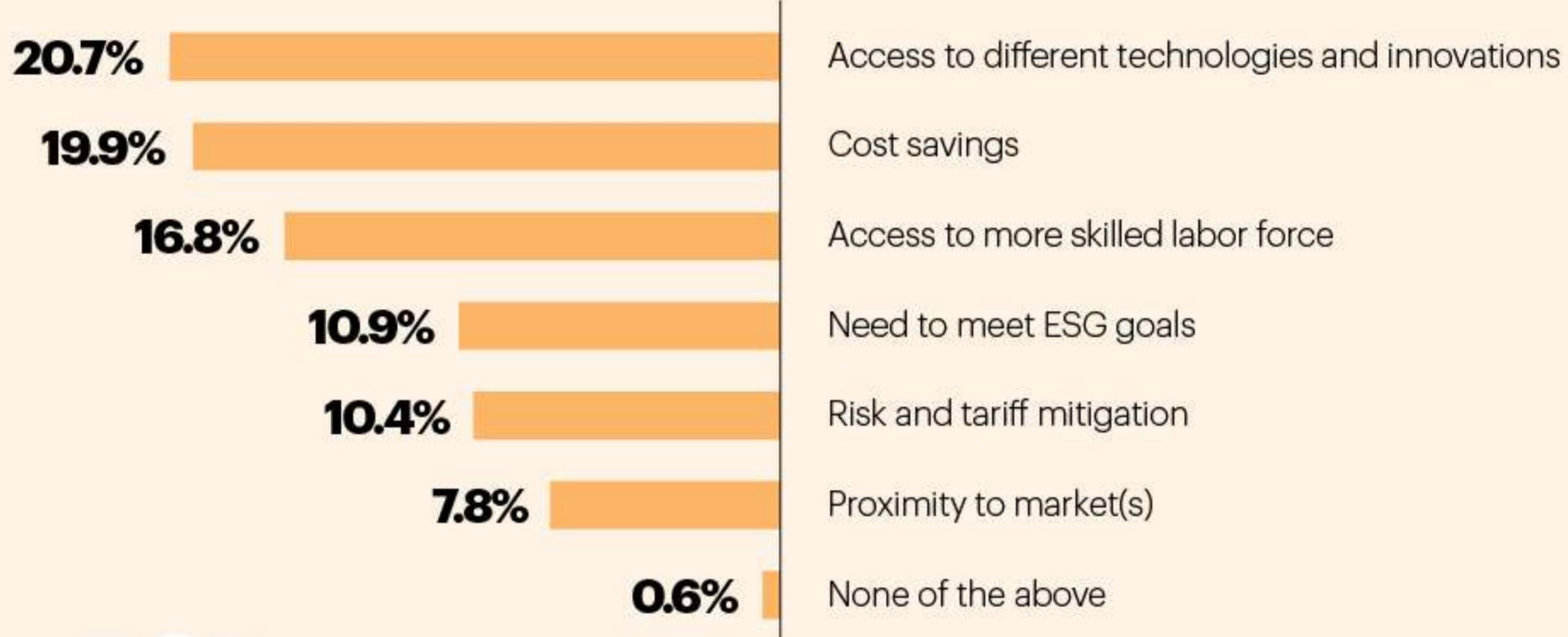


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Diversifying Supply Chains

What's driving supply chain diversification in your company?

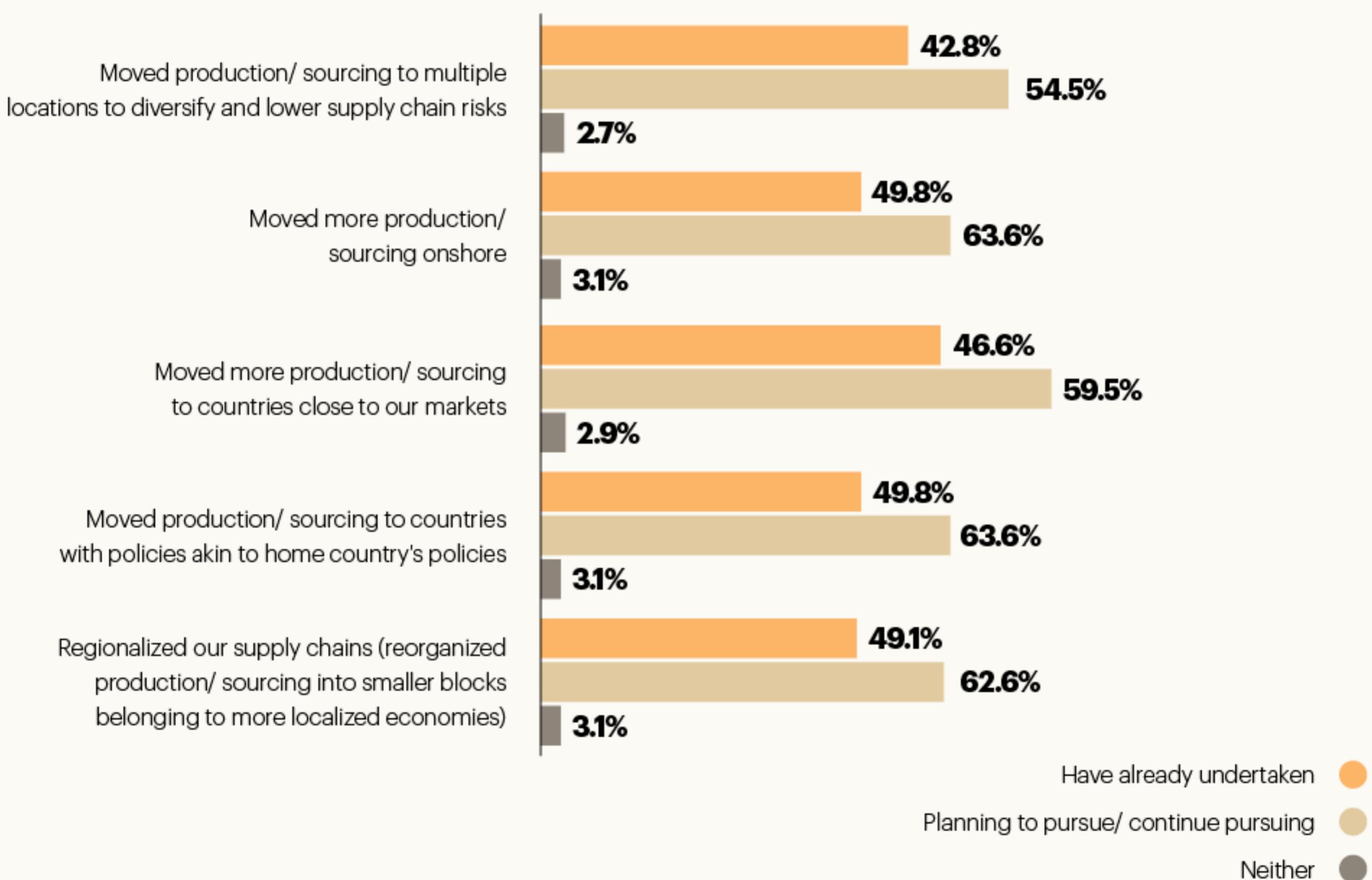


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Restructuring Supply Chains

What have you done to restructure in the past 5 years?



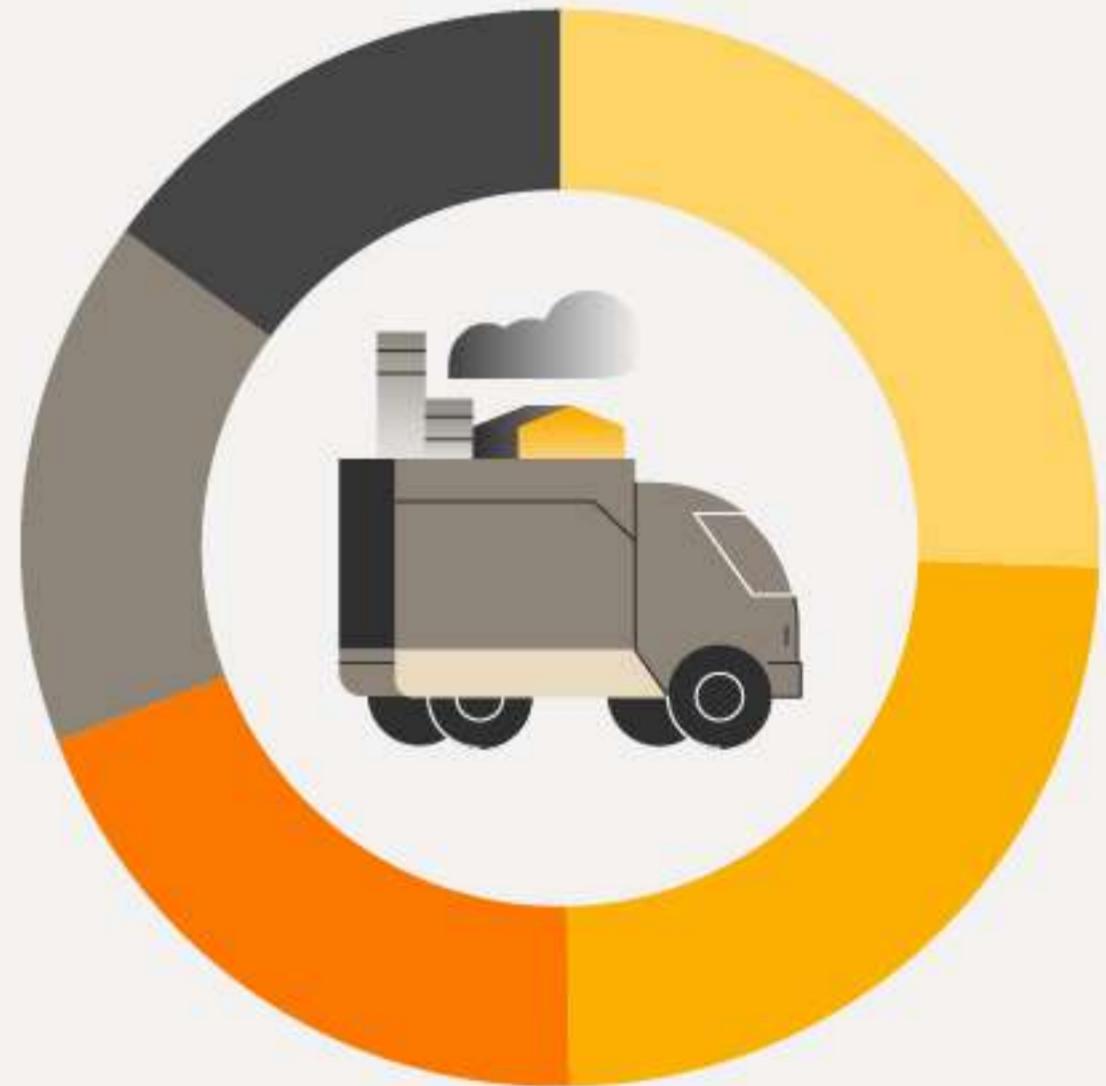
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Most Serious Infrastructure Gaps

What gaps pose the biggest threat to supply chains?

●	Weak digital infrastructure/limited digital infrastructure	25.7%
●	Insufficient warehouse and storage capacity	24.2%
●	Unreliable energy supply	19.4%
●	Poor transport infrastructure	15.7%
●	Labor skills shortages	15.0%

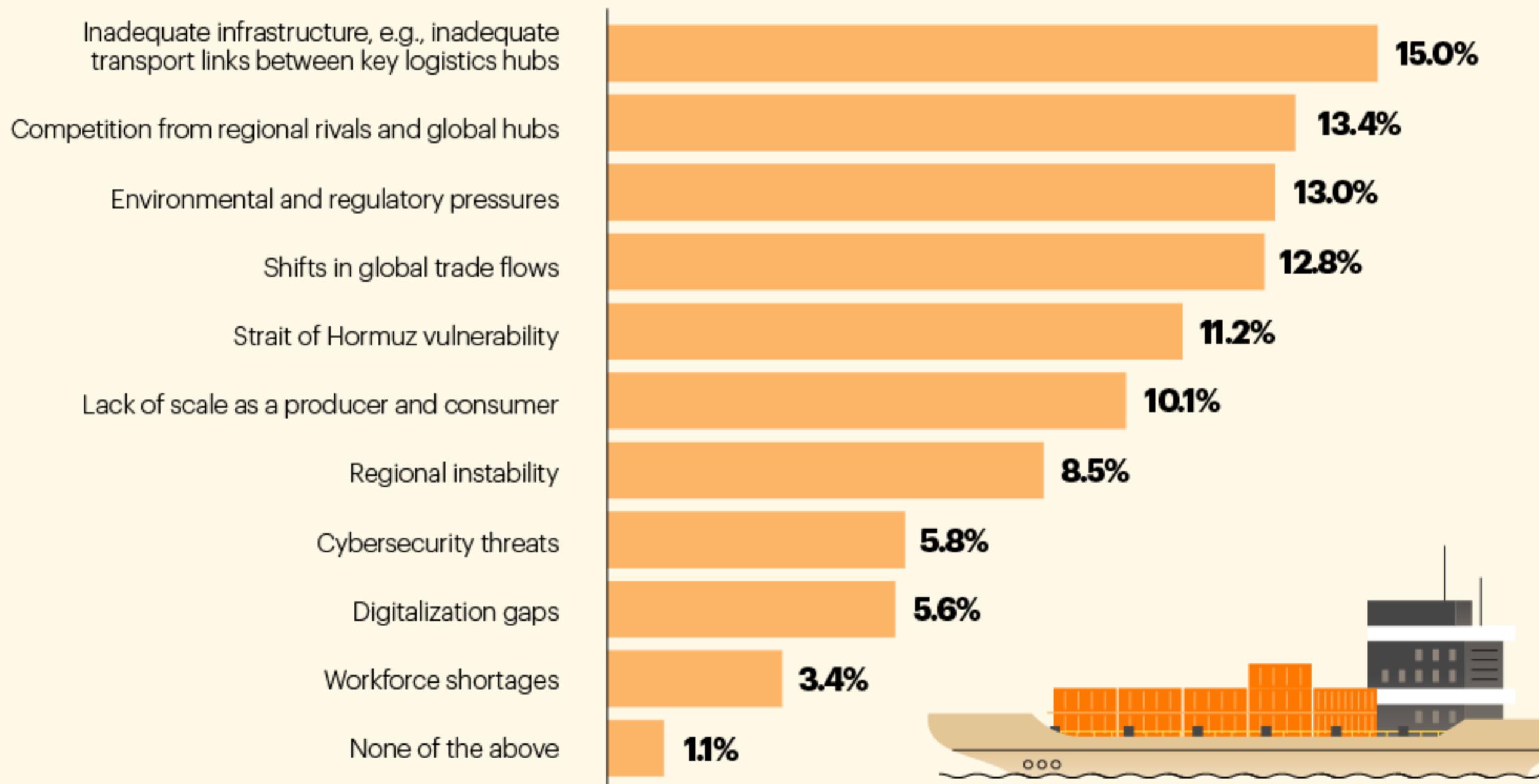


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GCC's Global Trade and Logistics Ambitions

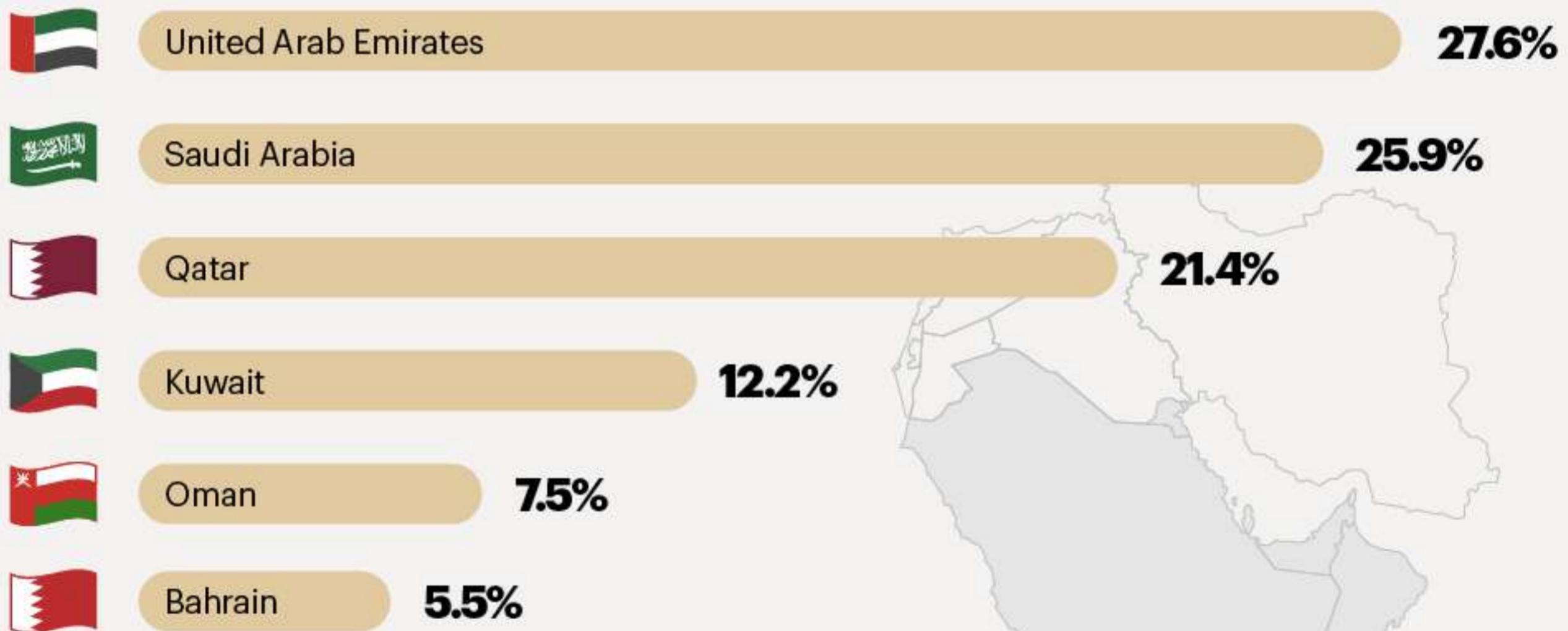
Saudi Arabia, UAE, Qatar and other Gulf nations want to be global trade & logistics hubs. What could hold them back?



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Gulf Diversification Leaders

Which countries have been most successful at economic diversification?



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What's Driving Gulf Diversification?



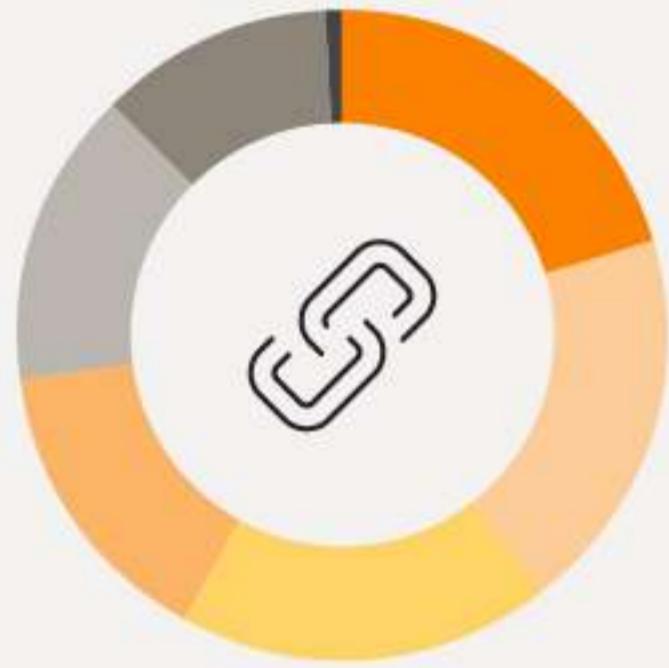
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Everybody's Using AI

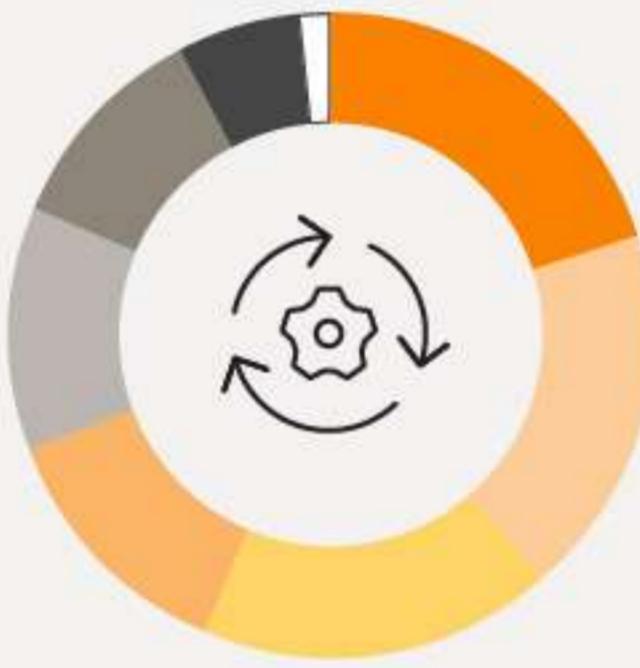
98–99% of respondents report that their companies are using AI.

Supply chain AI use cases



Transport management	20.4%
Supplier assessment and management	19.1%
Demand forecasting and planning	18.5%
Inventory optimization	14.8%
Supply chain visibility	14.8%
Warehouse automation	11.7%
We haven't started using AI	0.6%

Business operations AI use cases



IT	20.1%
Customer service	18.5%
Marketing and sales	17.9%
Finance and accounting	12.8%
Supply chain and operations	12.2%
Human resources	10.8%
Research and development	5.9%
We haven't started using AI	1.6%

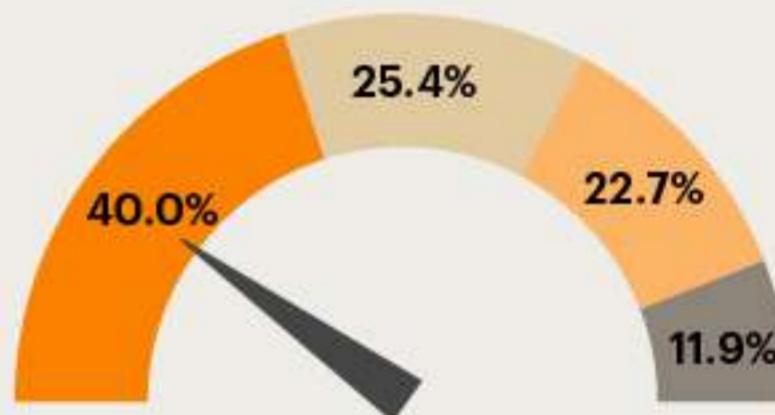
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Is Sustainability Losing Momentum?

Is your company slowing down or pausing its sustainability initiatives?

- No, we are continuing at the same pace
- Yes, we are slowing down
- Yes, we are pausing
- No, we are accelerating our efforts



If so, why?



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Top 10 2026 Emerging Markets

2026 Rank	Change
1 China	-
2 India	-
3 United Arab Emirates	-
4 Saudi Arabia	-
5 Malaysia	-
6 Indonesia	-
7 Qatar	▲ 1
8 Mexico	▼ 1
9 Thailand	-
10 Brazil	▲ 3



Top Emerging Markets

2026



Top 5 domestic logistics markets



Top 5 international logistics markets



Best 5 for business fundamentals

2026 Rank	Change	2026 Rank	Change	2026 Rank	Change
1 China	-	1 China	-	1 United Arab Emirates	-
2 India	-	2 India	-	2 Malaysia	-
3 Indonesia	-	3 Mexico	-	3 Saudi Arabia	-
4 Qatar	▲ 4	4 United Arab Emirates	▲ 2	4 Qatar	▲ 1
5 Saudi Arabia	▼ 1	5 Saudi Arabia	-	5 Oman	▲ 3



Digital Readiness

The emerging markets that lead in digital skills, e-commerce, sustainability, and support for entrepreneurs and startups.

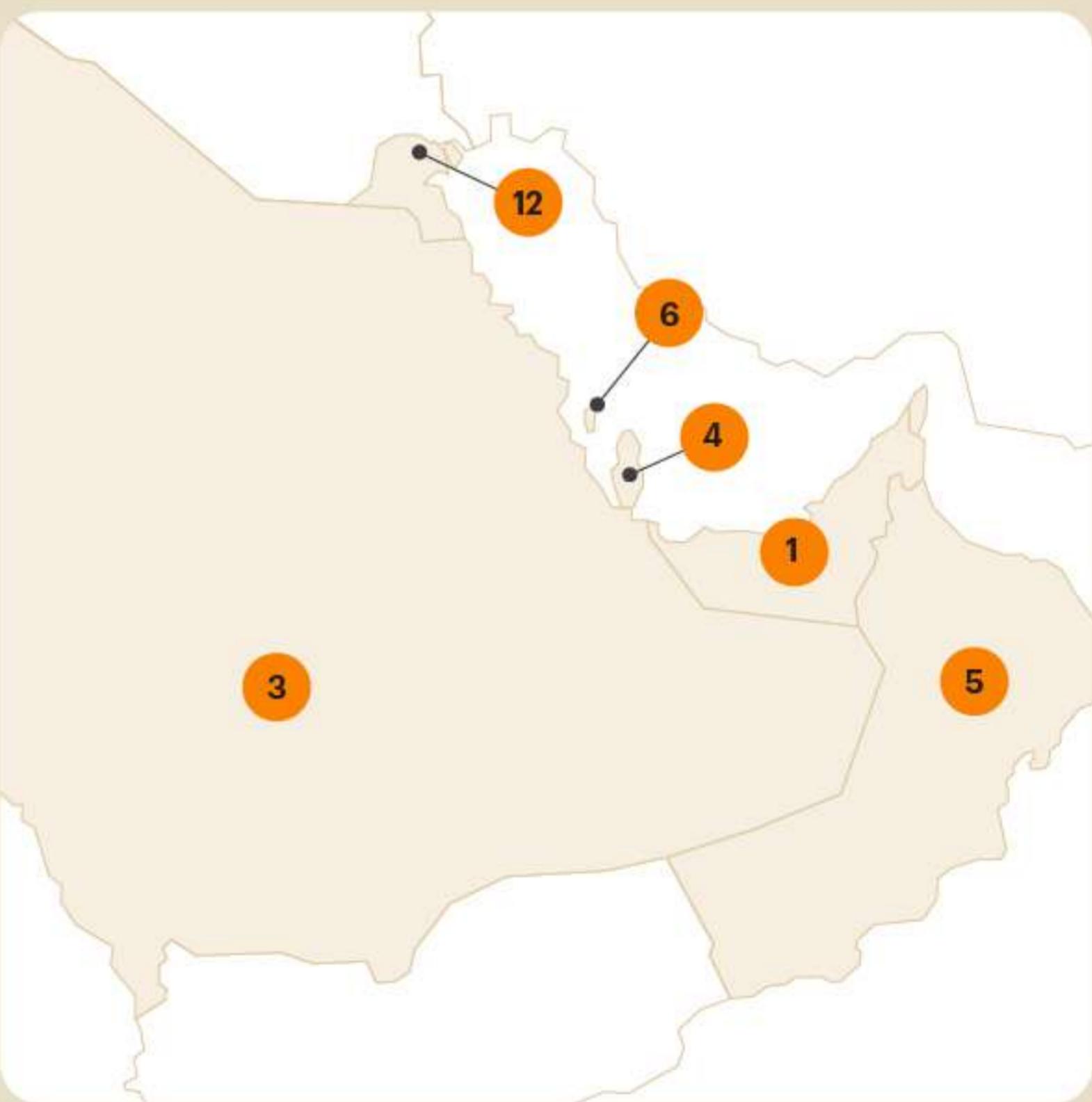
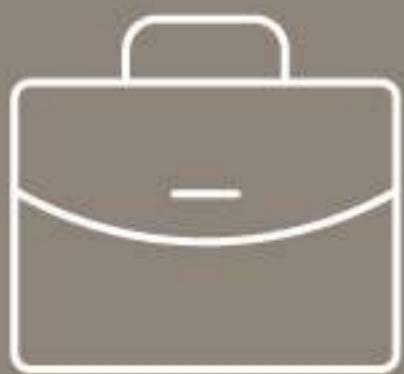
	2026 Rank	Change
1	China	-
2	Malaysia	▲ 1
3	India	▲ 4
4	United Arab Emirates	▼ 2
5	Saudi Arabia	-
6	Qatar	▼ 2
7	Russia	▲ 6
8	Turkey	▲ 2
9	Indonesia	▲ 5
10	Thailand	▼ 4



Gulf Business Fundamentals

Gulf countries lead most other emerging markets in business climate and fundamentals

2026 Rank	Change
1 United Arab Emirates	-
3 Saudi Arabia	-
4 Qatar	▲ 1
5 Oman	▲ 3
6 Bahrain	-
12 Kuwait	▼ 1



Key Changes

Who's gaining and losing ground in core capabilities

Nigeria

▲ 7



7 ▼

Ethiopia

Ukraine

▲ 5

5 ▼

Uganda

Iran

▲ 4

5 ▼

Indonesia

Ukraine

▲ 17



8 ▼

Pakistan

Algeria

▲ 10

8 ▼

Lebanon

Kazakhstan

▲ 8

7 ▼

Bolivia

Brazil

▲ 8



9 ▼

Ethiopia

Ukraine

▲ 7

6 ▼

Oman/Kuwait

Tunisia

▲ 7

6 ▼

Iran/Tanzania

Argentina

▲ 8



13 ▼

Egypt

Brazil

▲ 7

7 ▼

India

Paraguay

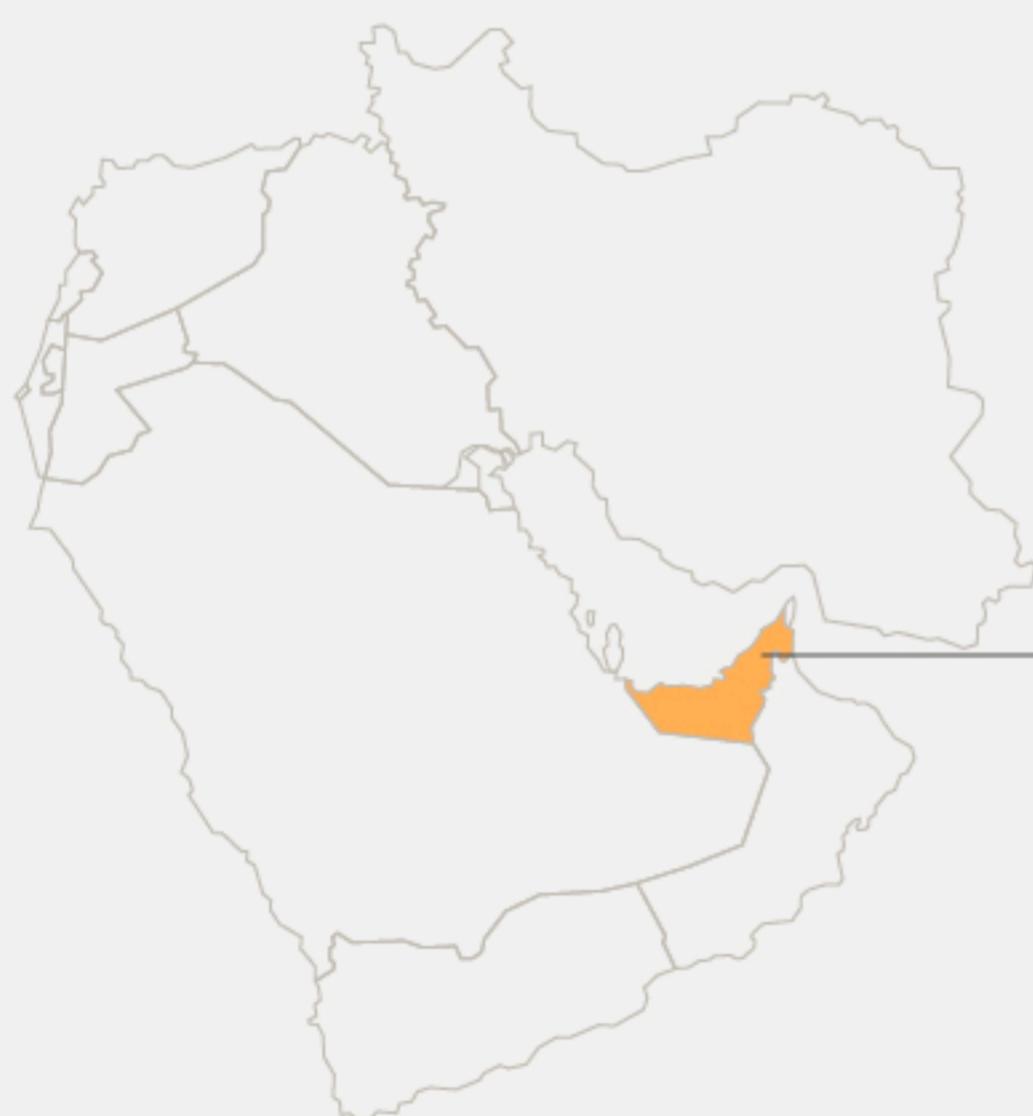
▲ 6

6 ▼

Cambodia/Russia/Iran



The UAE leads the world's emerging markets



2026 Global
Emerging
Markets
Ranking*

Gulf
Ranking**



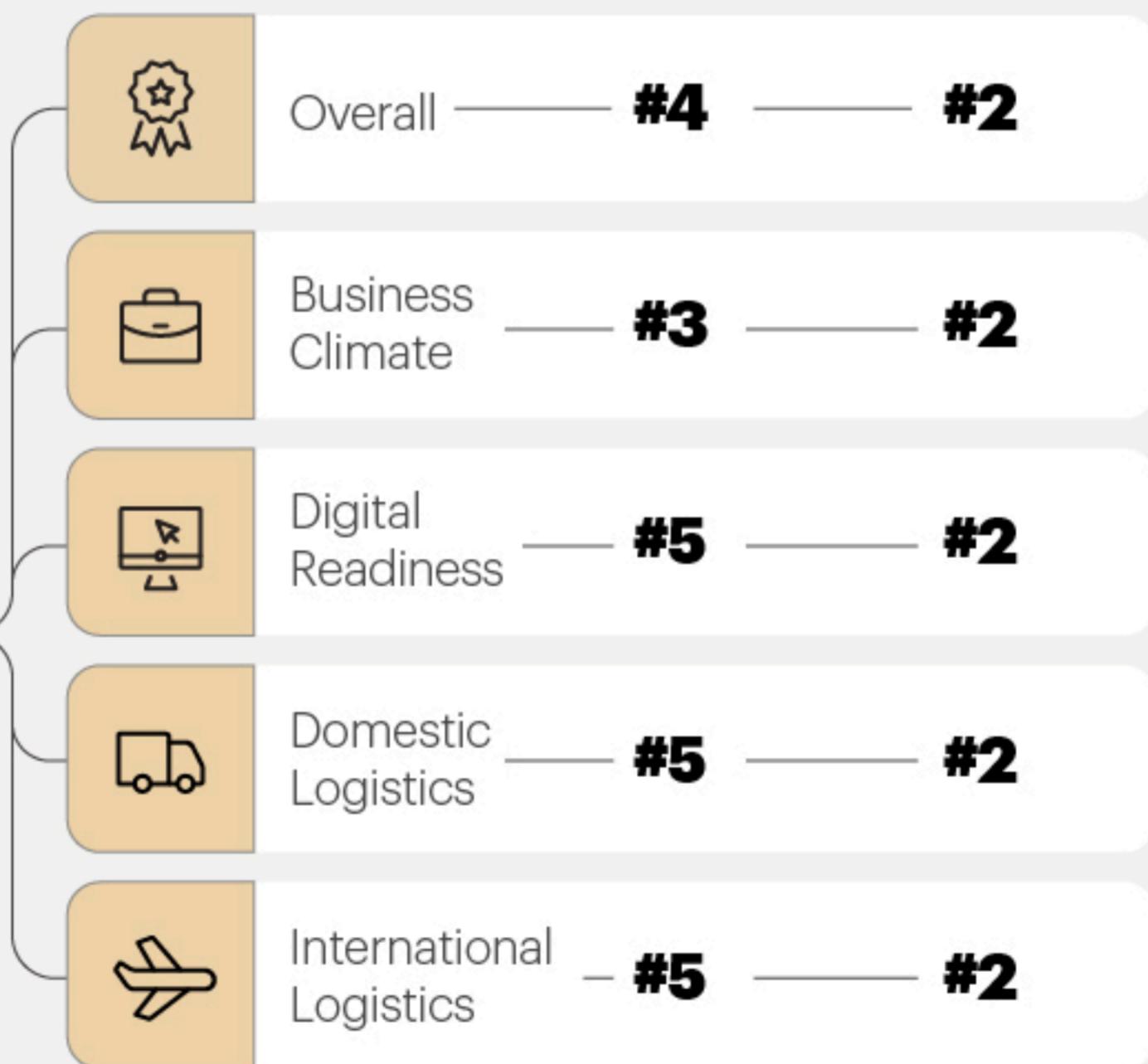
*Ranking in 50-country index **Ranking in six-country GCC

Saudi Arabia leads the world's emerging markets



2026 Global
Emerging
Markets
Ranking*

Gulf
Ranking**



*Ranking in 50-country index **Ranking in six-country GOC