

2026 Agility Emerging Markets Index

Highlights



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Highlights

Outlook for 2026: Volatile

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

14.4%

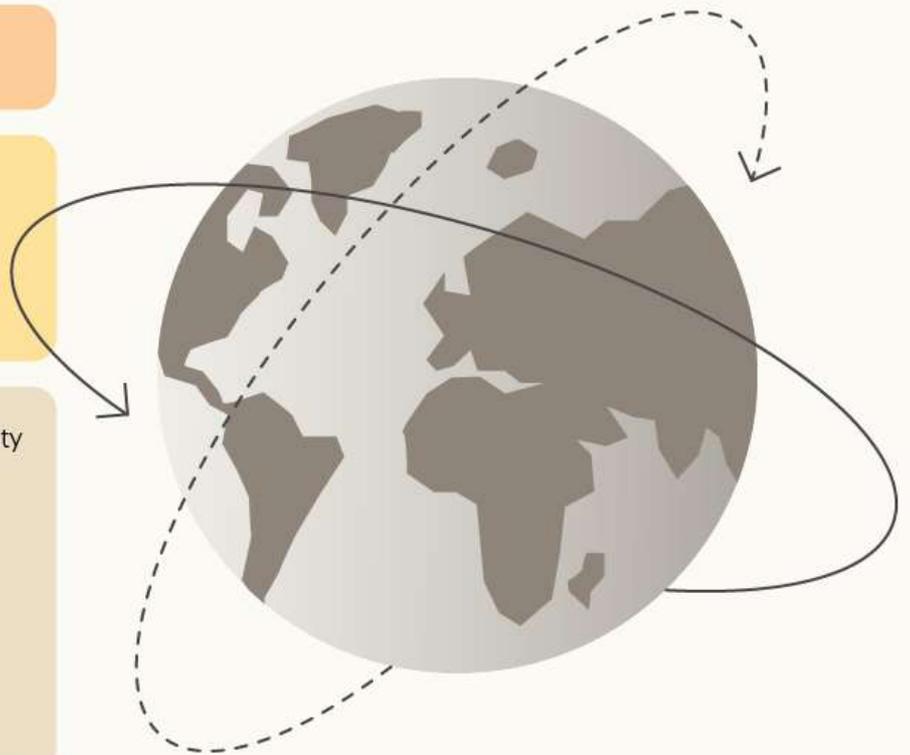
I expect less volatility next year

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



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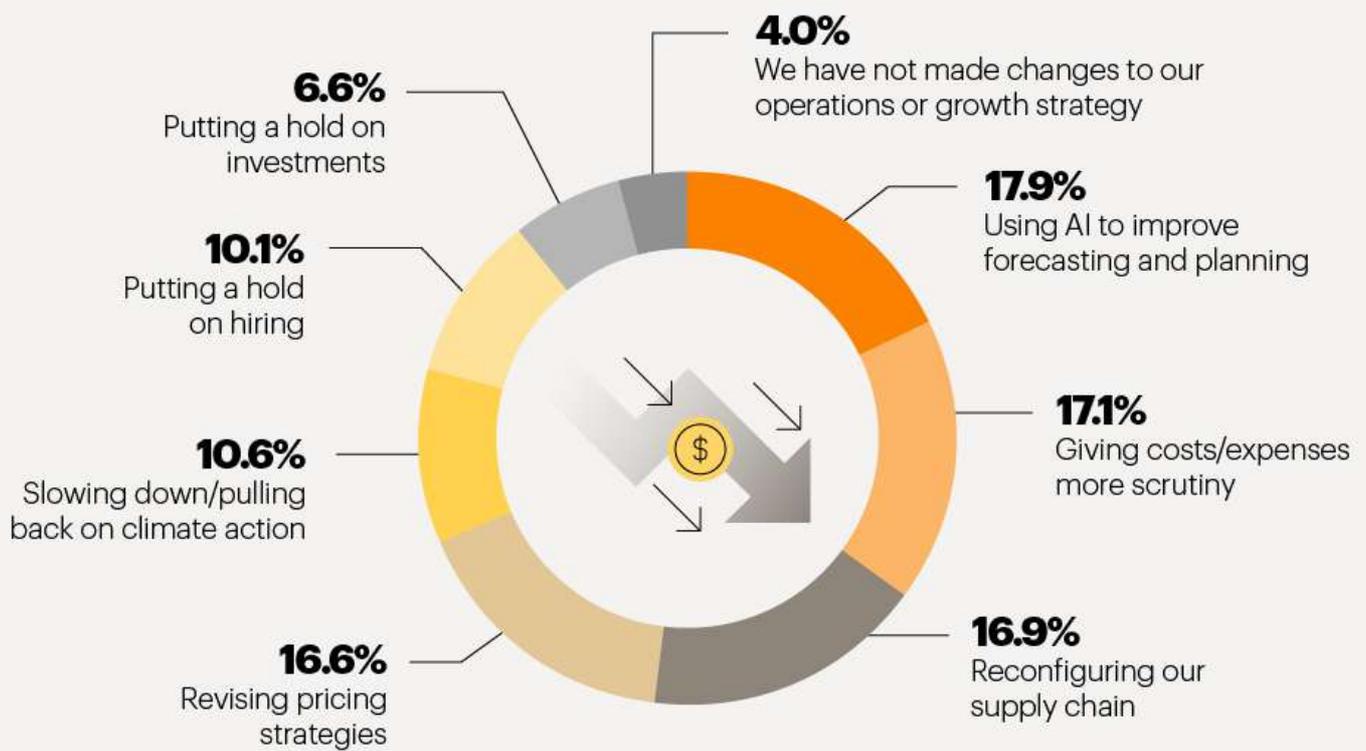


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Highlights

How Companies are Managing Volatility

How is your company responding to volatility?

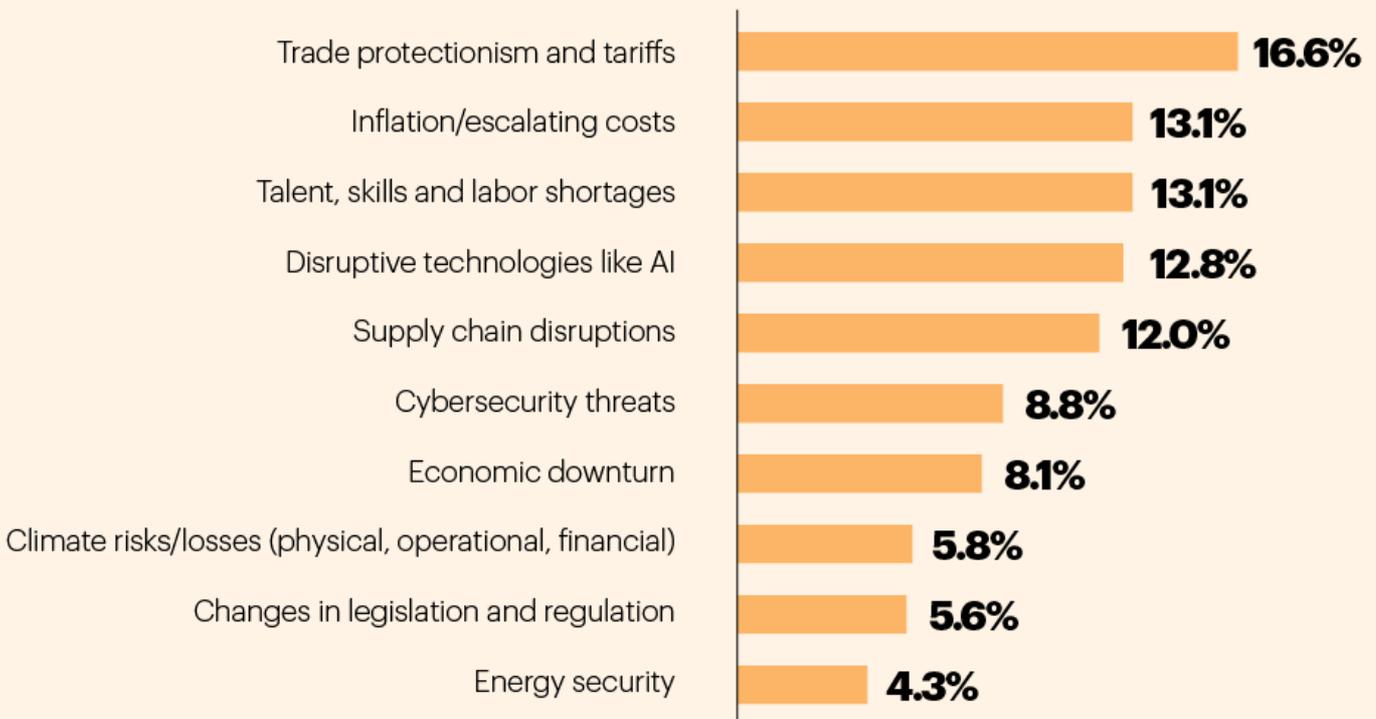


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Highlights

Risks Companies Say They Aren't Prepared For



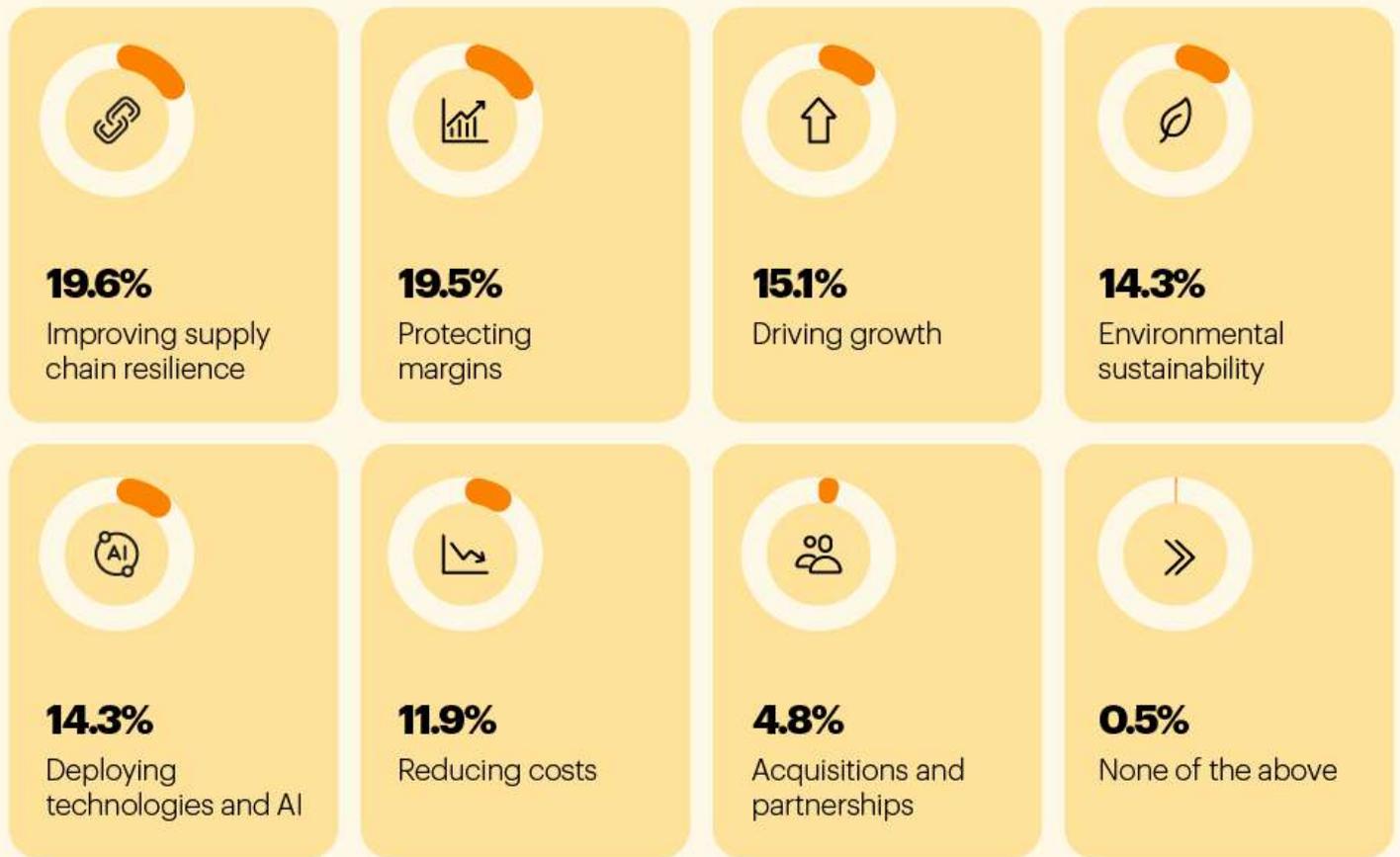
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Highlights

Companies' Highest Priorities in 2026



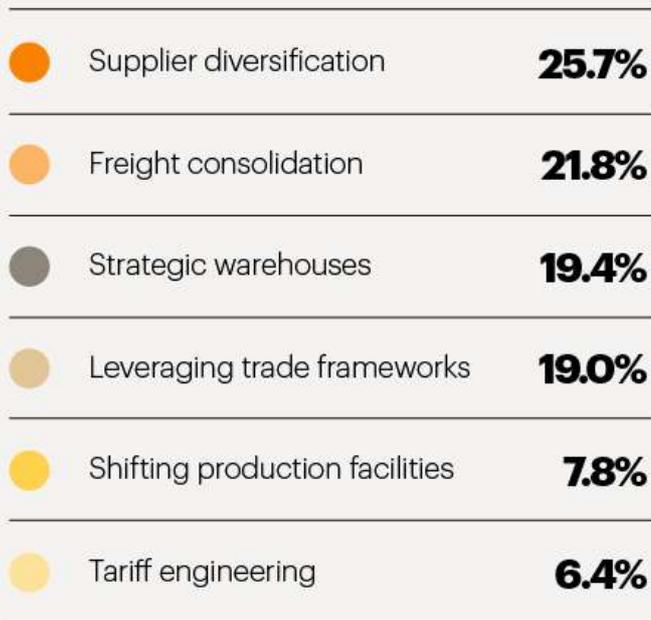
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Highlights

Dealing with Higher Costs & Tariffs

What are companies doing to cope with cost increases?



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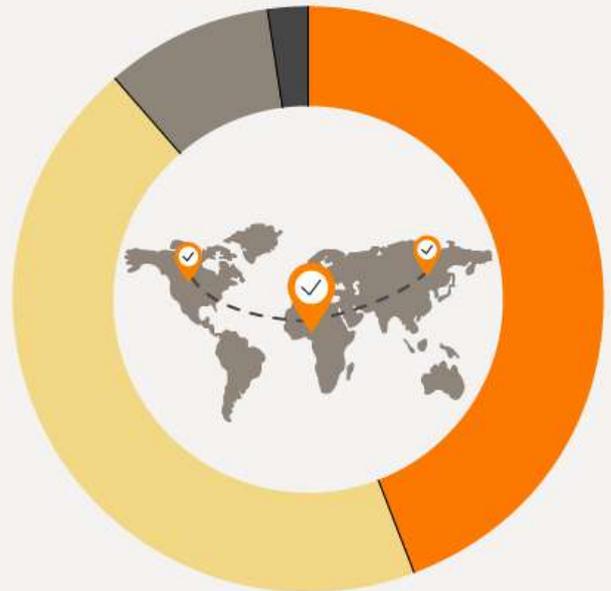
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Highlights

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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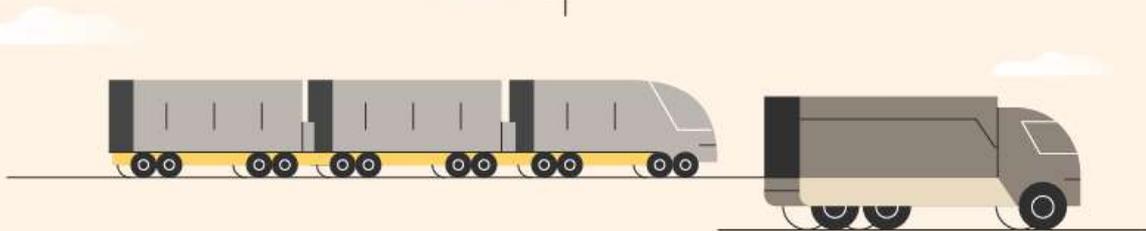


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Highlights

Diversifying Supply Chains

What's driving supply chain diversification in your company?



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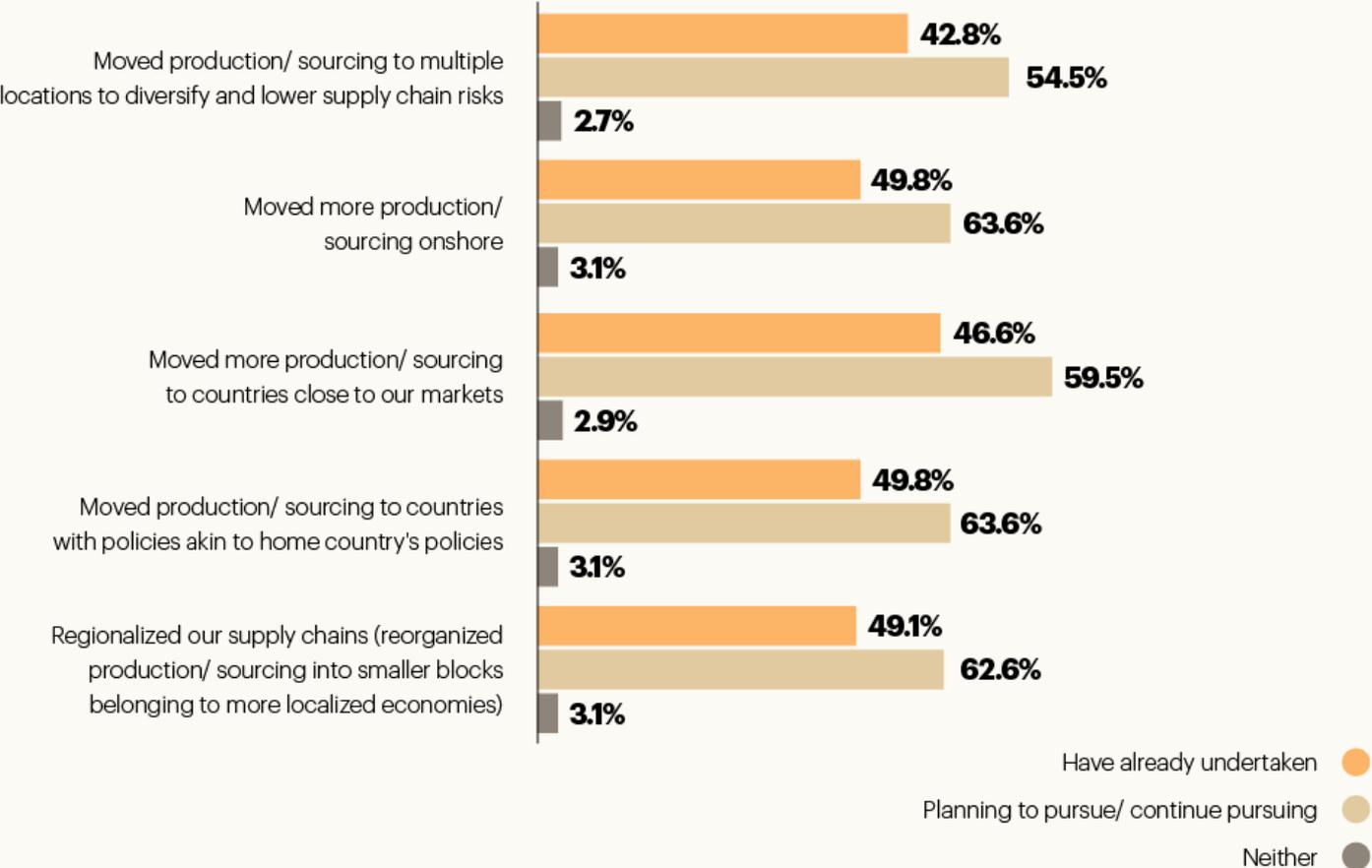


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Highlights

Restructuring Supply Chains

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



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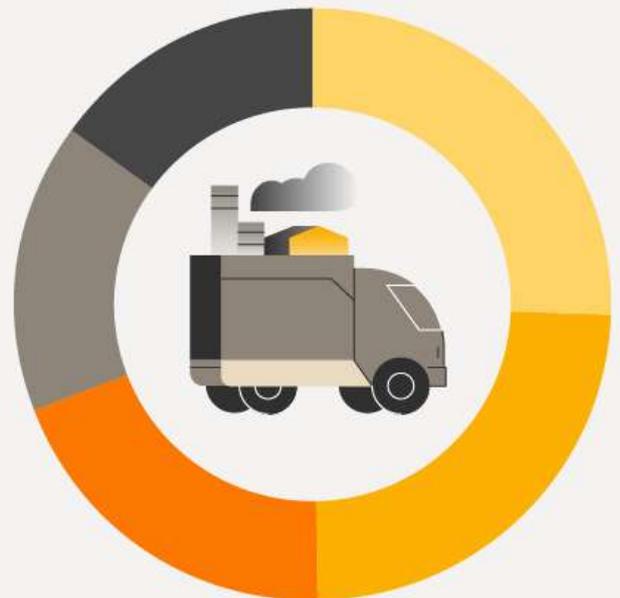


Highlights

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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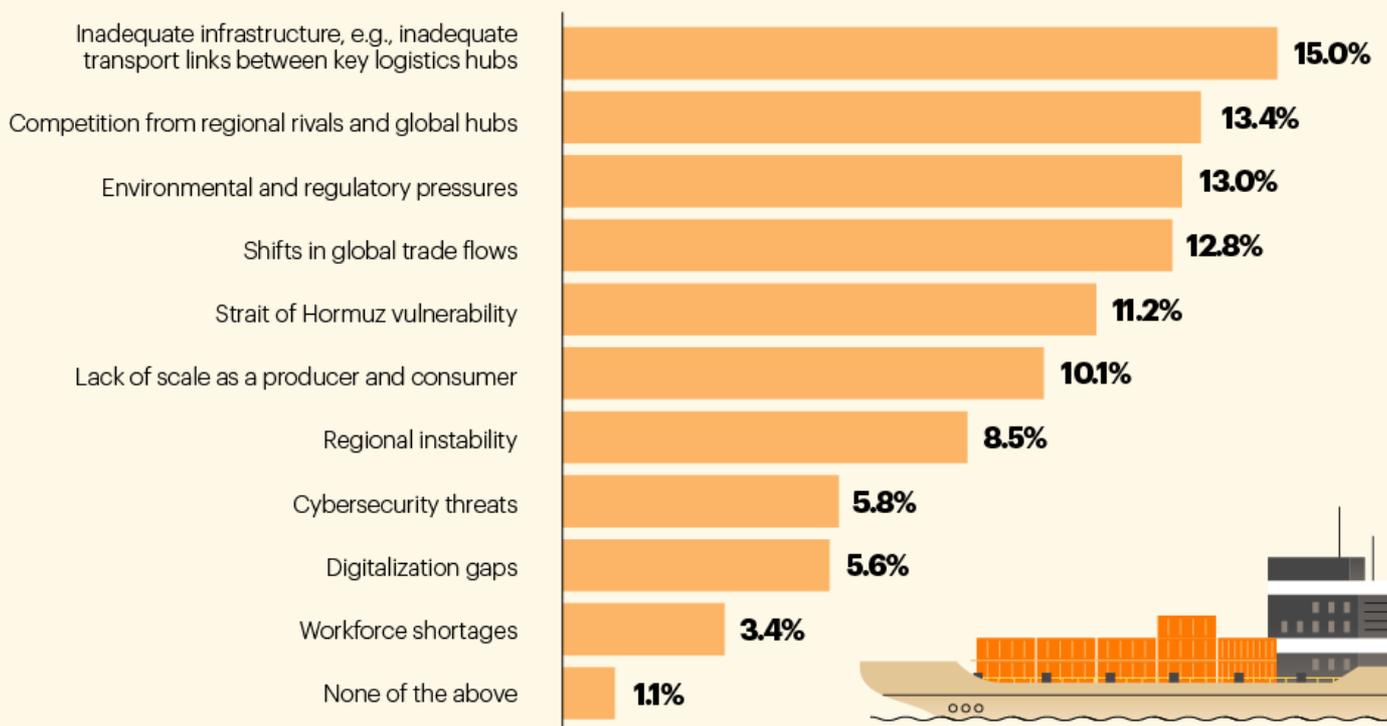


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Highlights

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?



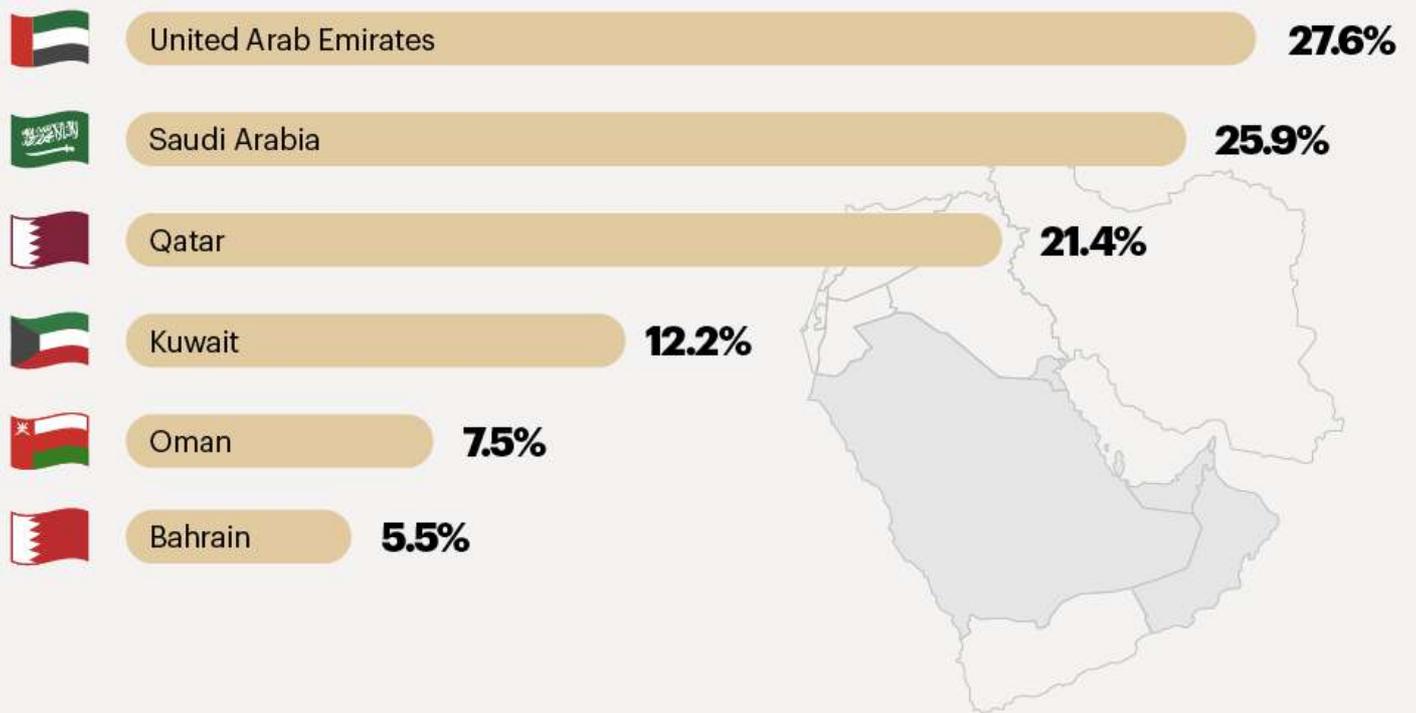
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Highlights

Gulf Diversification Leaders

Which countries have been most successful at economic diversification?

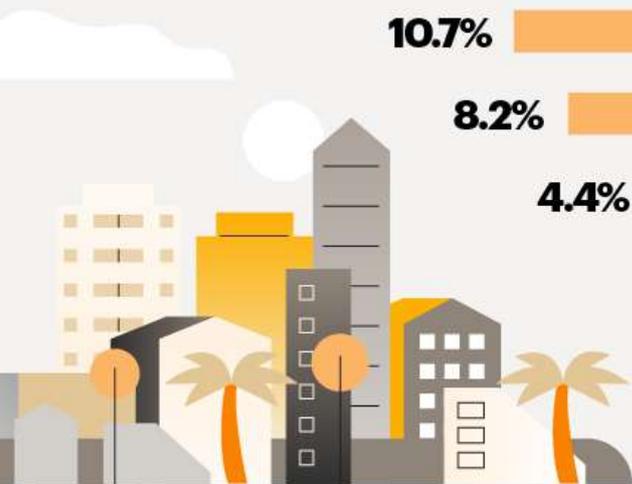
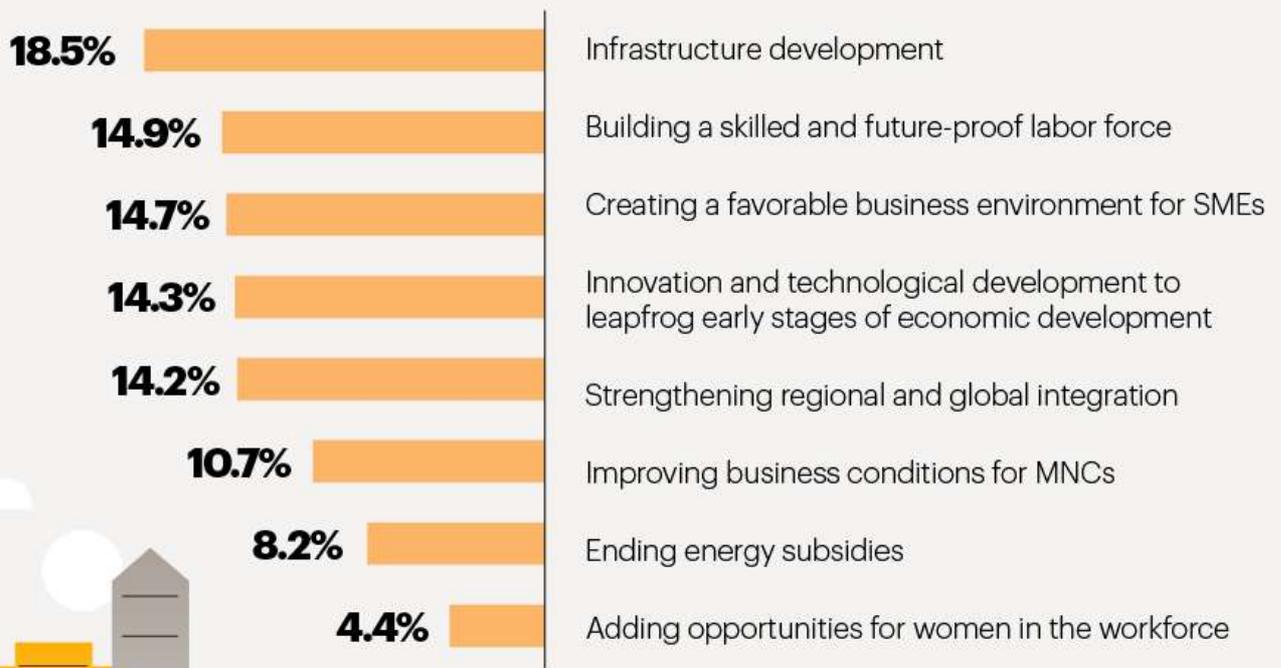


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Highlights

What's Driving Gulf Diversification?



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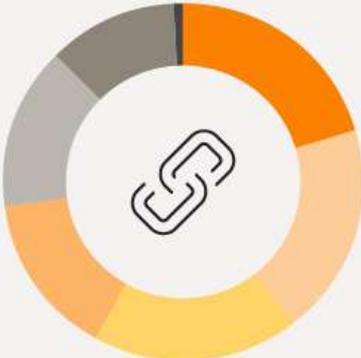


Highlights

Everybody's Using AI

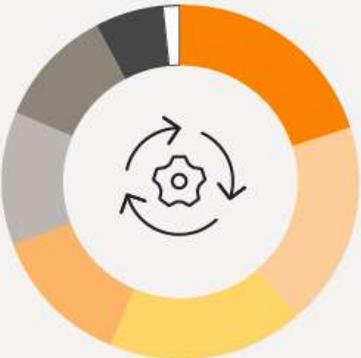
98–99% of respondents report that their companies are using AI.

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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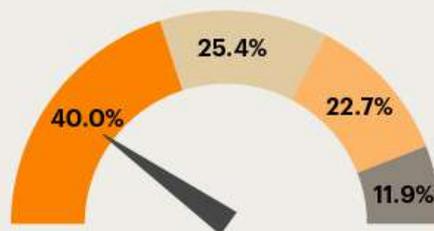


Highlights

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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Highlights

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

2026 Rank

- 1 China
- 2 India
- 3 Indonesia
- 4 Qatar
- 5 Saudi Arabia



Top 5 international logistics markets

2026 Rank

- 1 China
- 2 India
- 3 Mexico
- 4 United Arab Emirates
- 5 Saudi Arabia



Best 5 for business fundamentals

2026 Rank

- 1 United Arab Emirates
- 2 Malaysia
- 3 Saudi Arabia
- 4 Qatar
- 5 Oman



Highlights

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

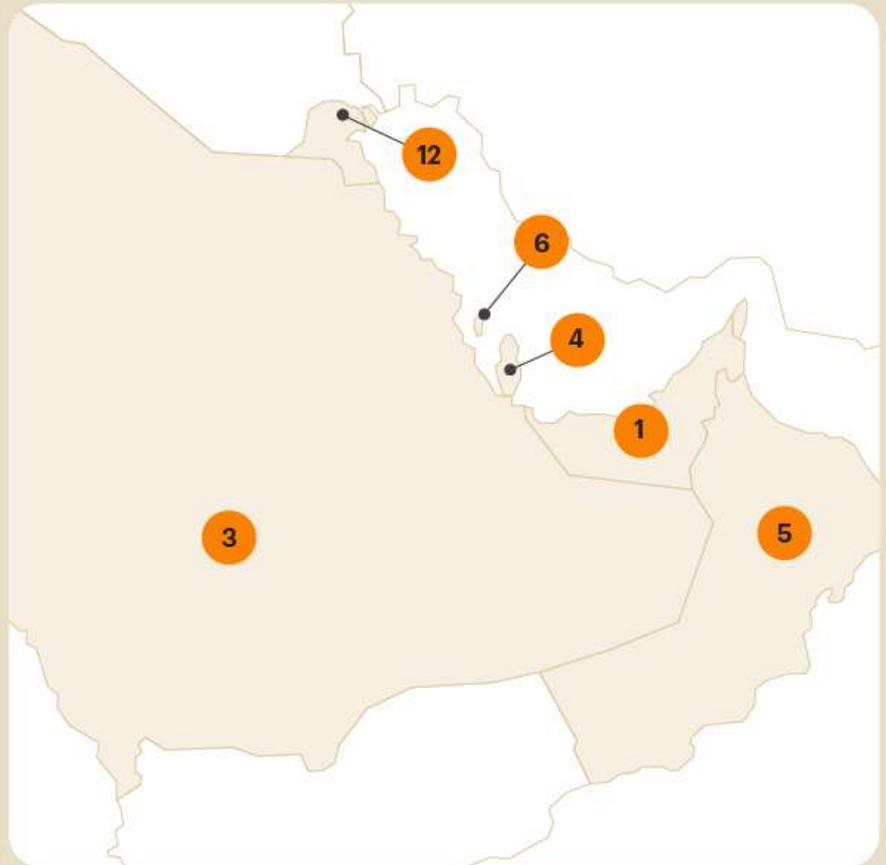


Highlights

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



Highlights

Key Changes

Who's gaining and losing ground in core capabilities



Highlights

The UAE leads the world's emerging markets

The UAE leads the world's emerging markets and its neighbors in key areas.

2026 Global Emerging Markets Ranking* Gulf Ranking**



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

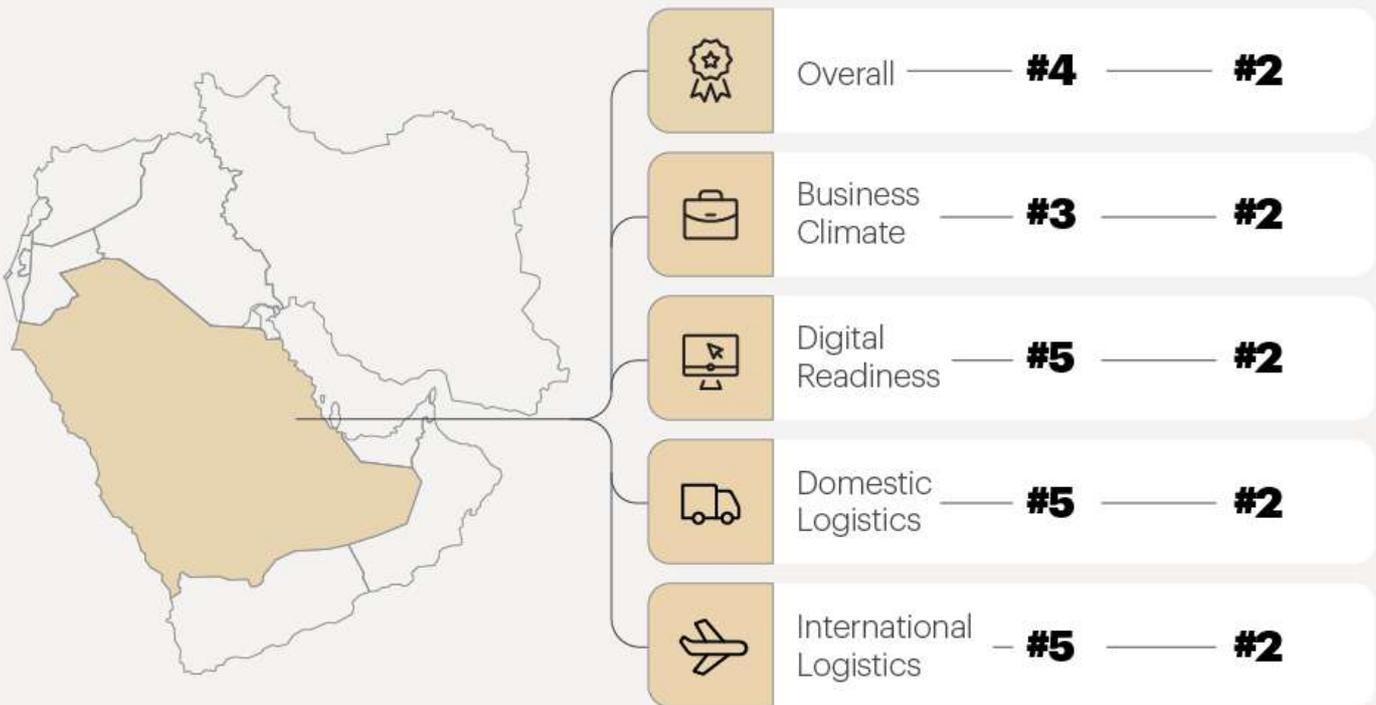


Highlights

Saudi Arabia leads the world's emerging markets

Saudi Arabia leads the world's emerging markets and its neighbors in key areas.

2026 Global Emerging Markets Ranking* Gulf Ranking**



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