



2025

Emerging Markets Logistics Index

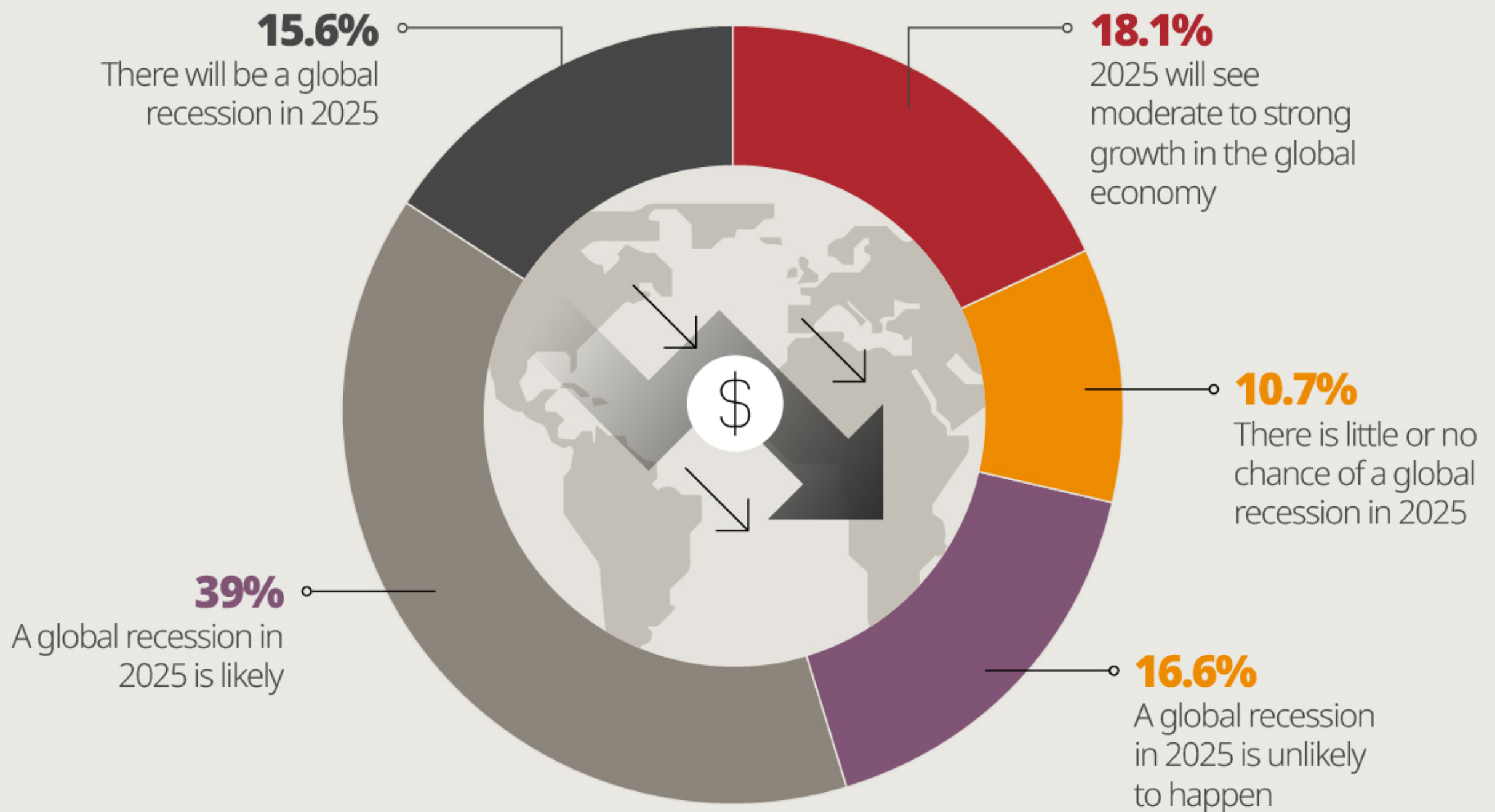
HIGHLIGHTS





Likelihood of Recession

Which of the following statements most closely matches your opinion on 2025 global economic prospects?

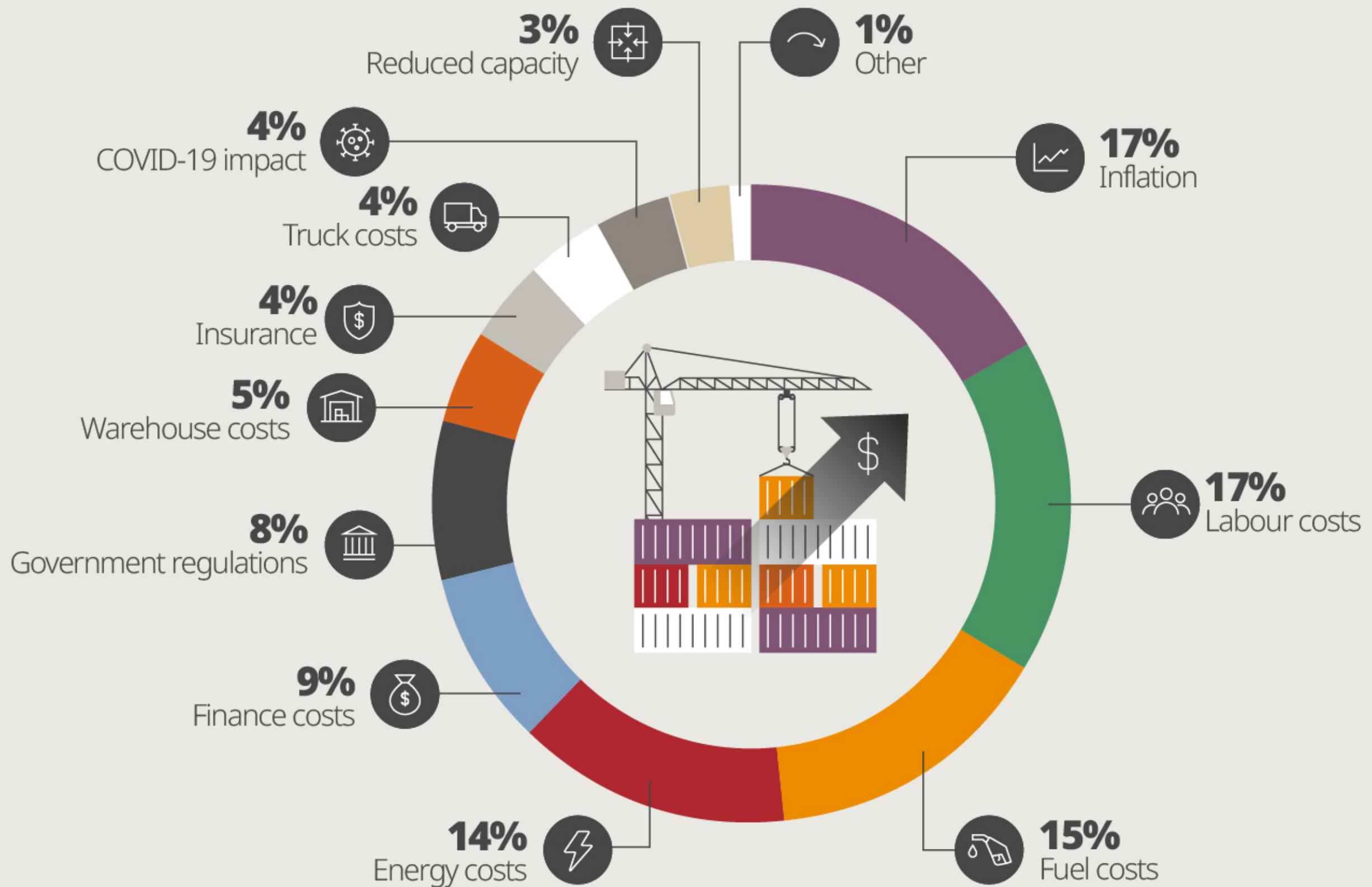


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Driving Logistics Costs

What is the top cost driver in your logistics operations?

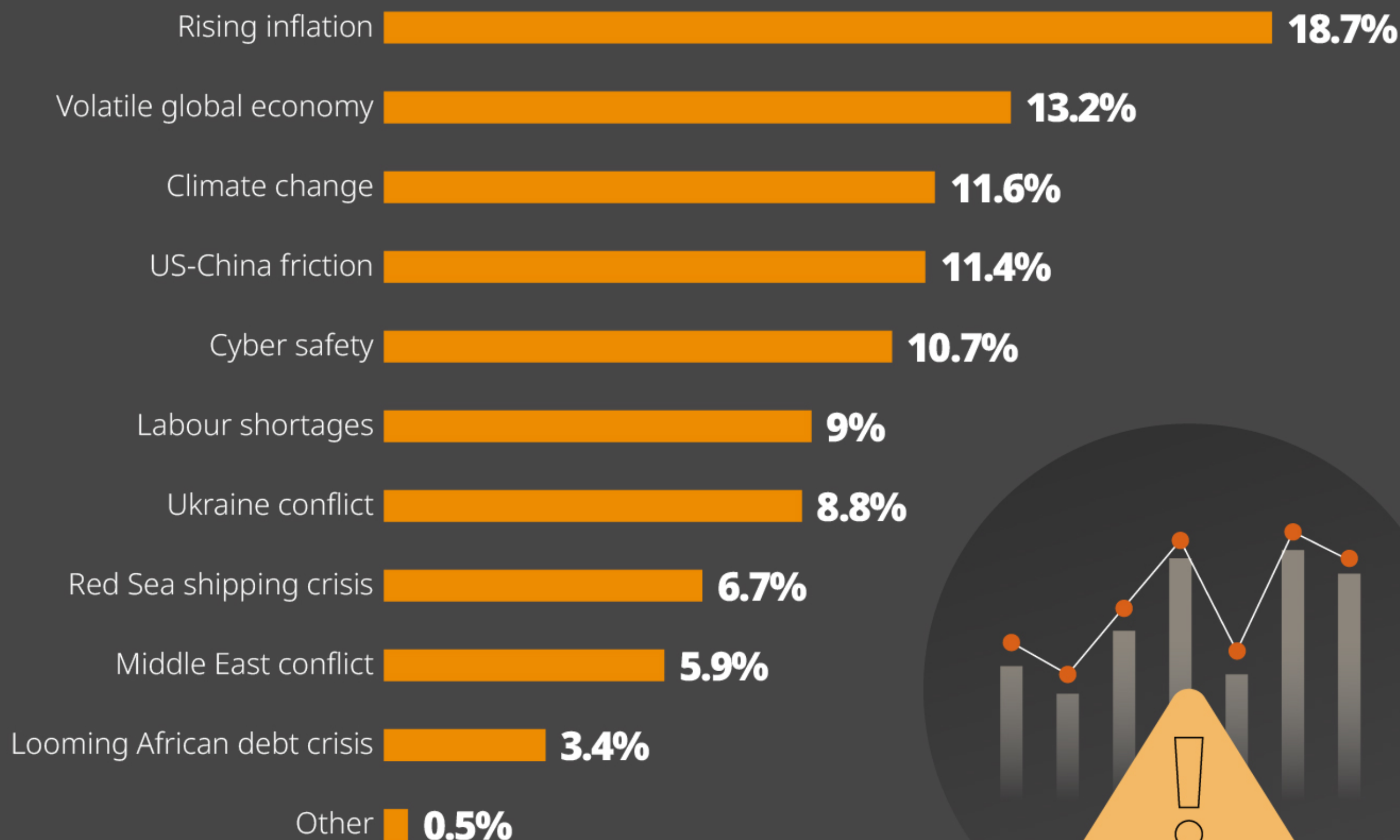


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Risks to Growth

What is the top risk to your growth?

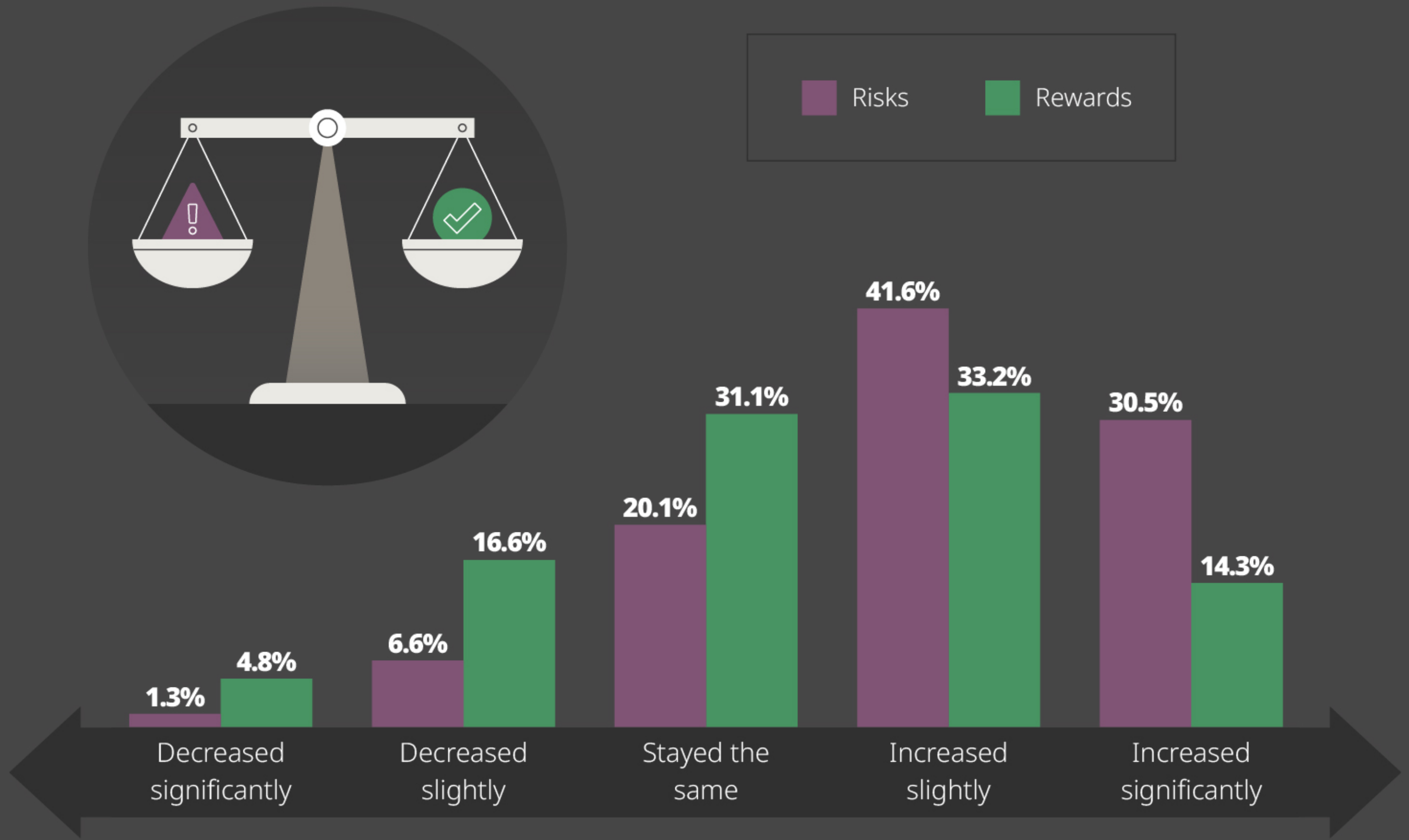


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Risks in Emerging Markets

In emerging markets, how has risk/reward changed over the past 12 months?

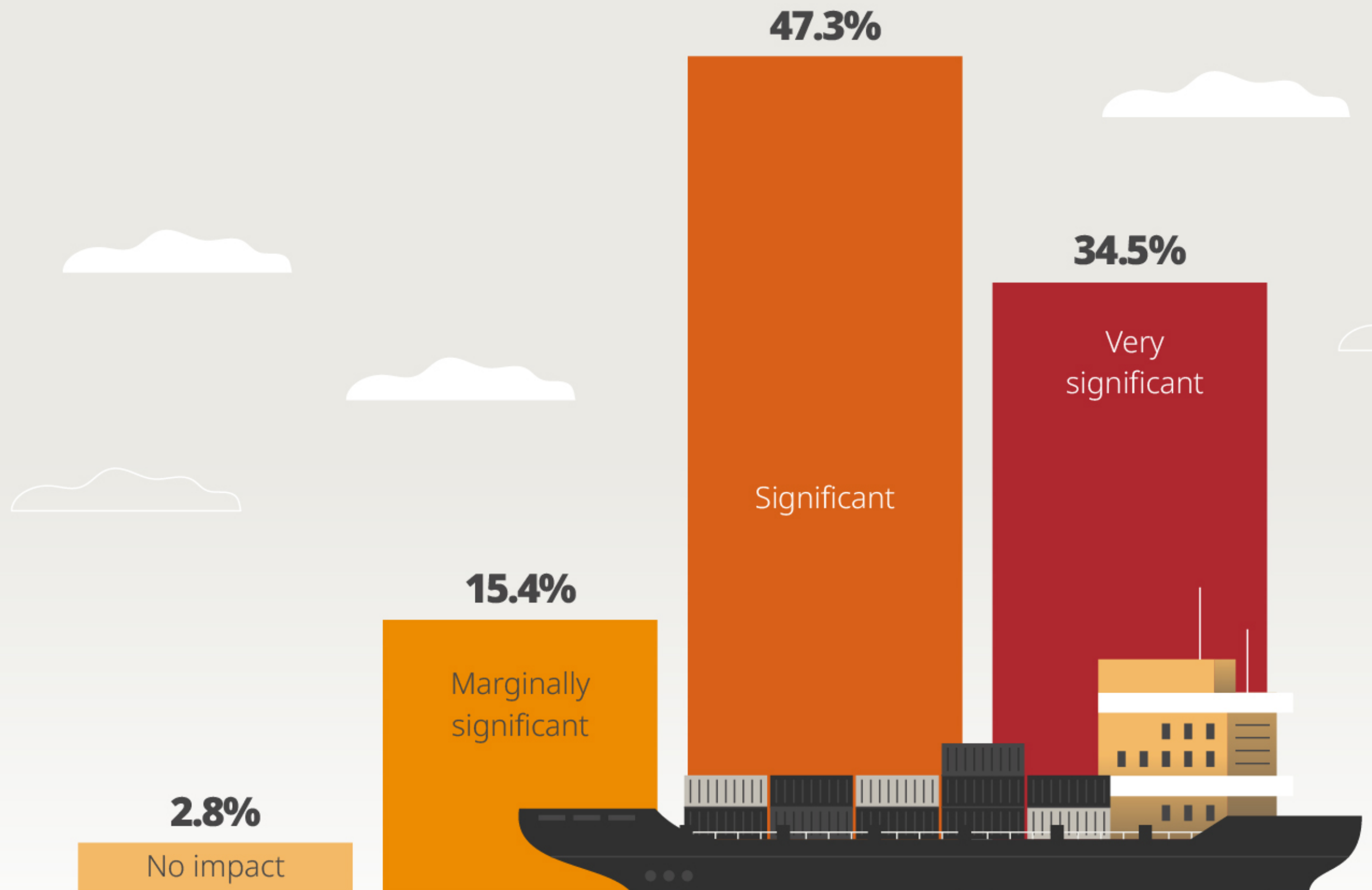


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Trade Protectionism

What is the impact of protectionism and tariffs on your supply chain?

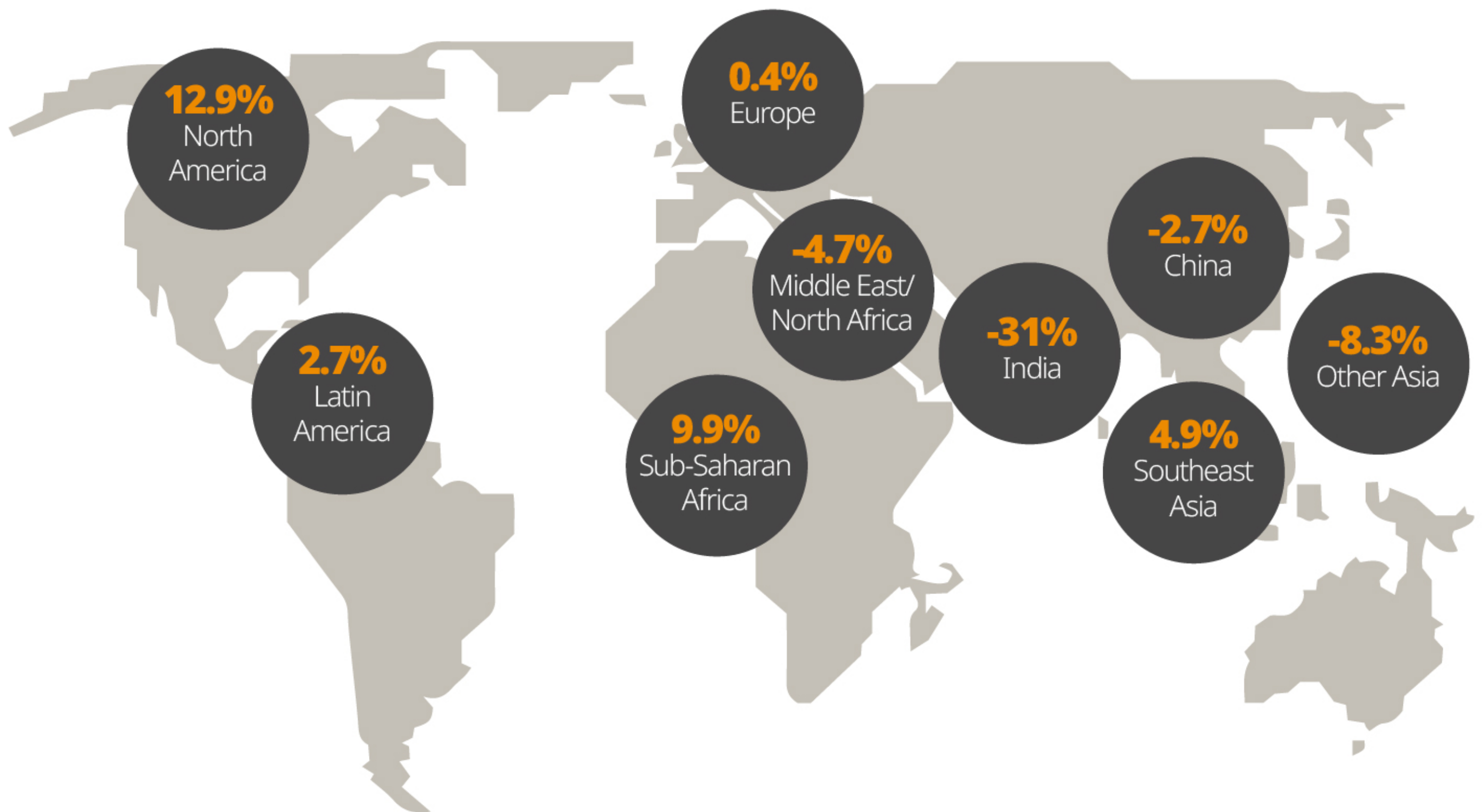


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Reshoring & Diversification

Do you plan to move production/sourcing activities **to** or **from** any of the following regions?

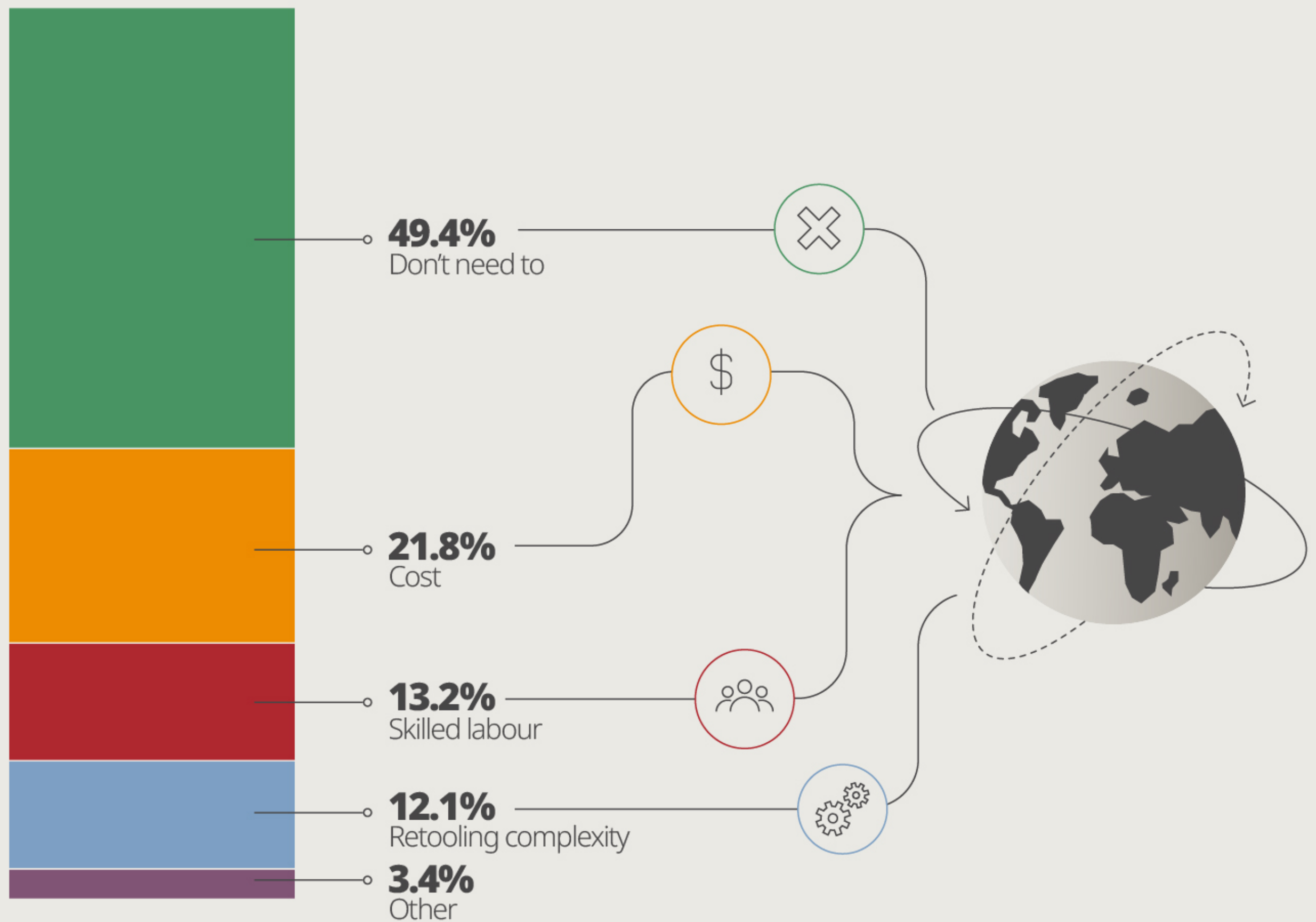


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Staying Put

What is the **main** reason for not wanting to move production/sourcing activities?

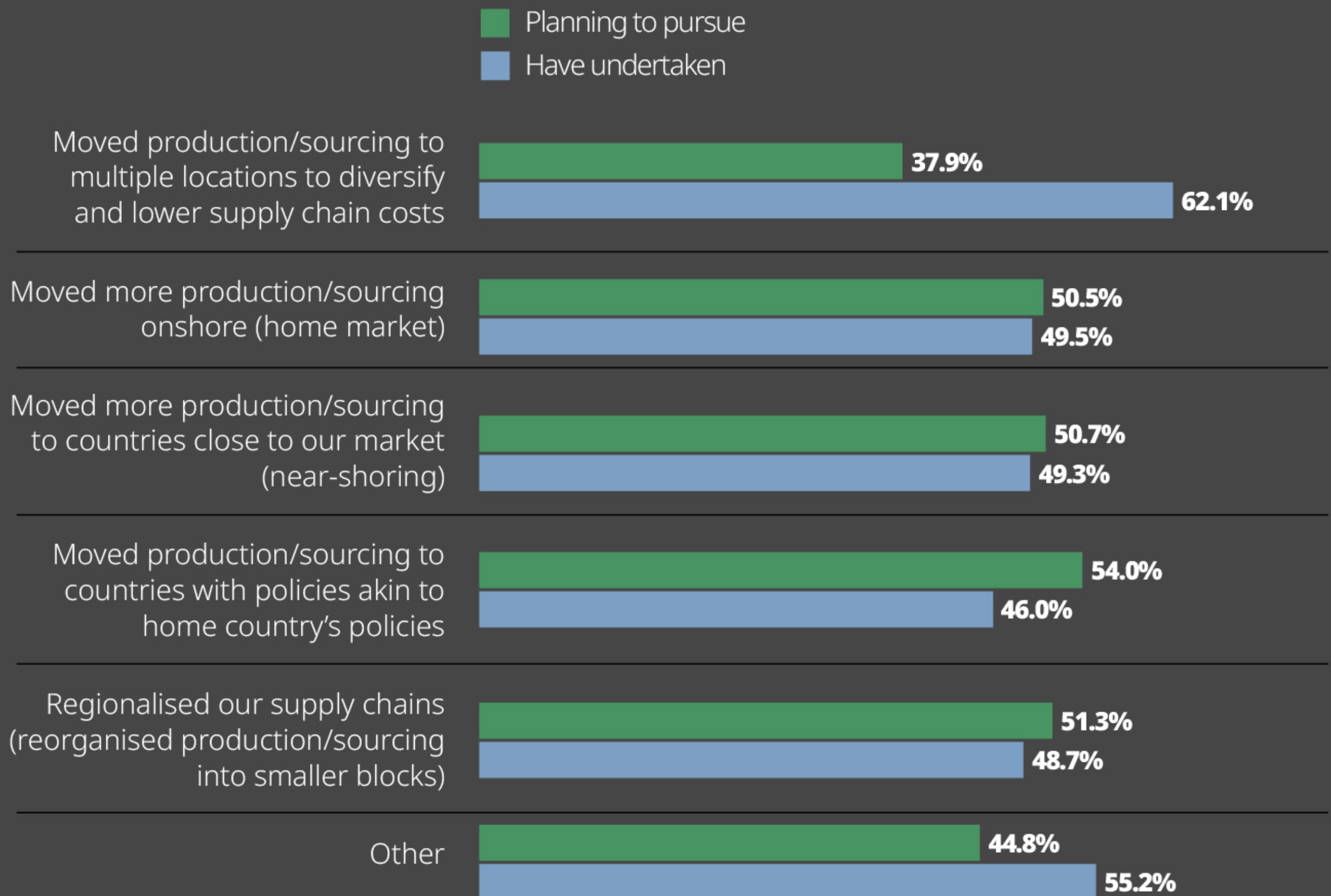


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Making Changes

Have you done any of the following to restructure your supply chain?

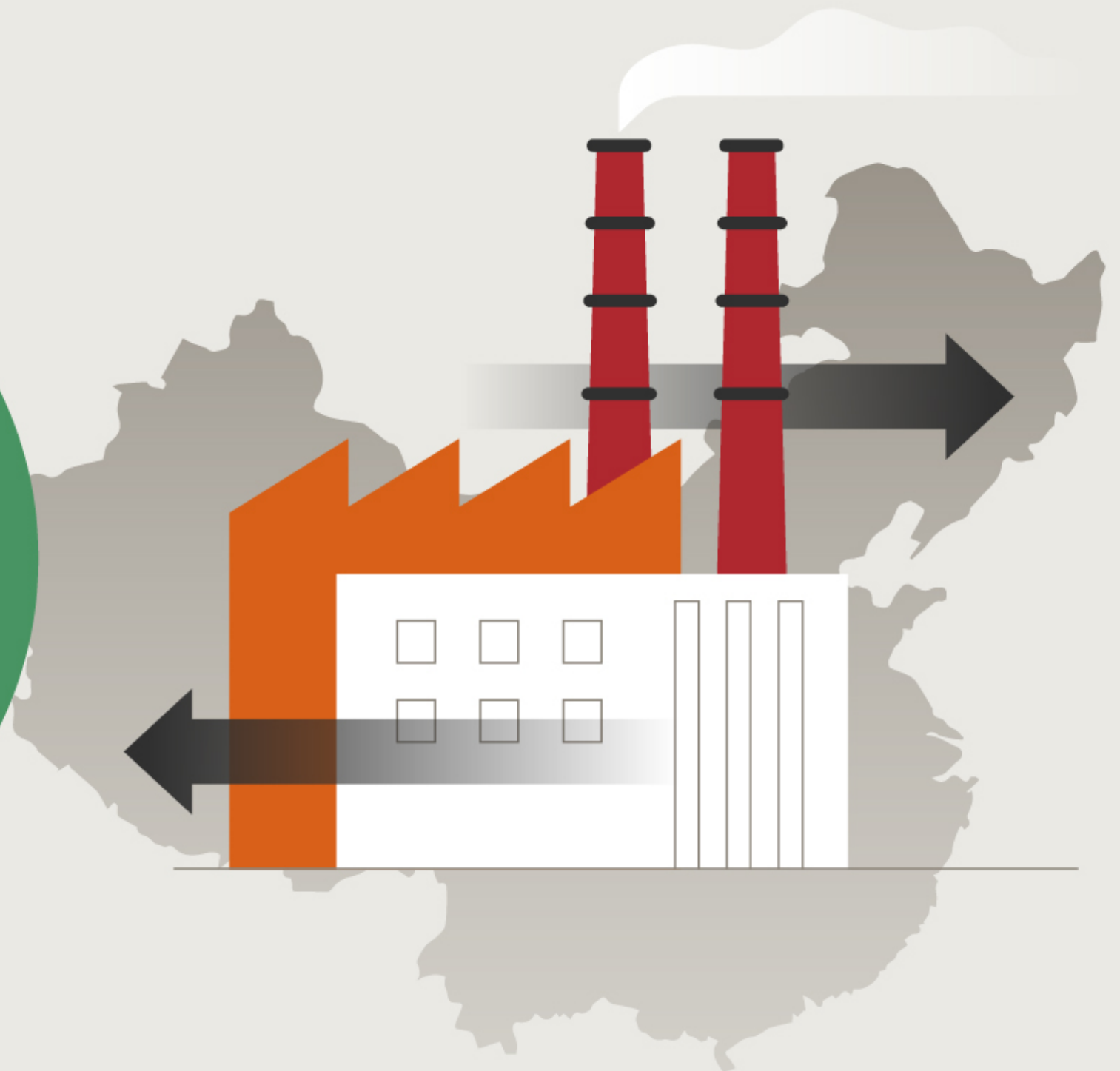
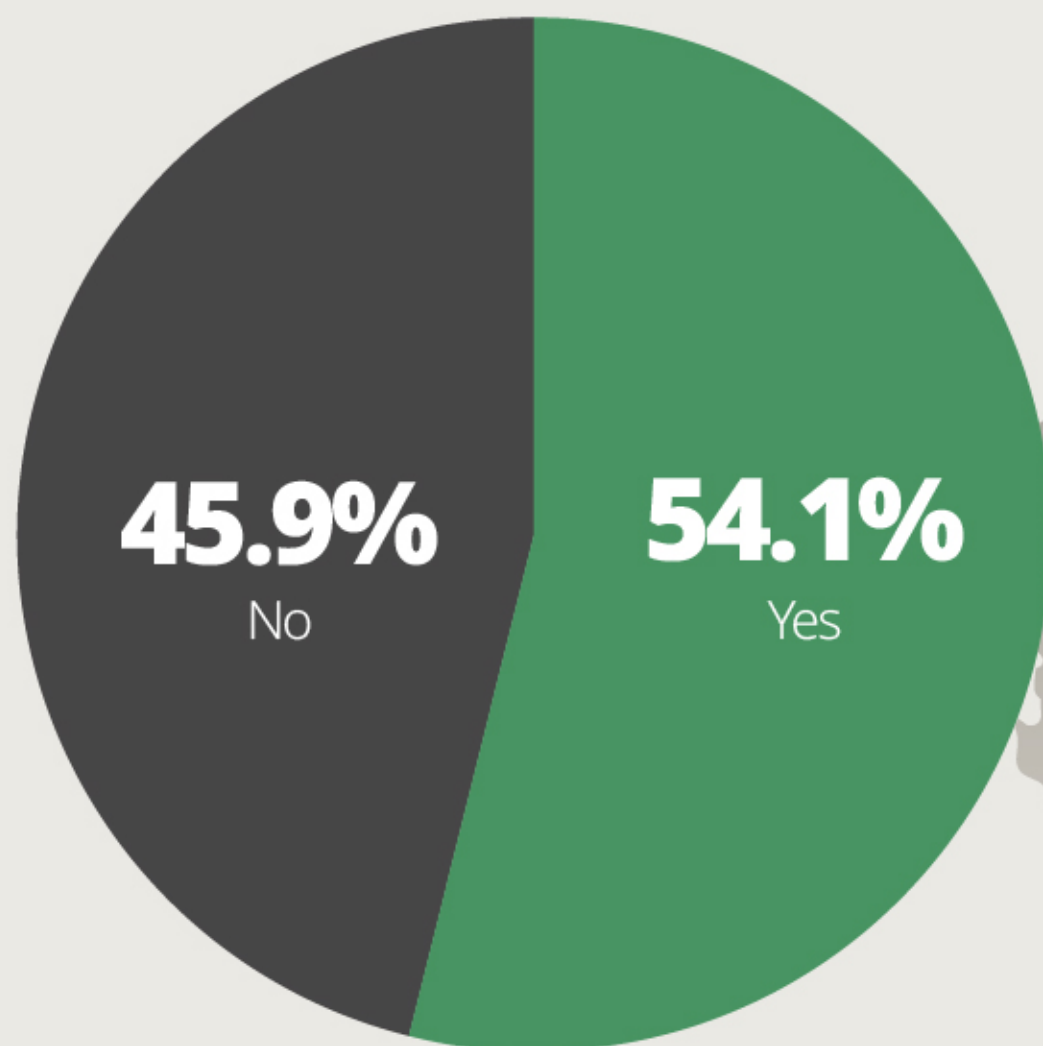


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The China Question

Do you intend to move any of your production/sourcing out of China in the next five years?

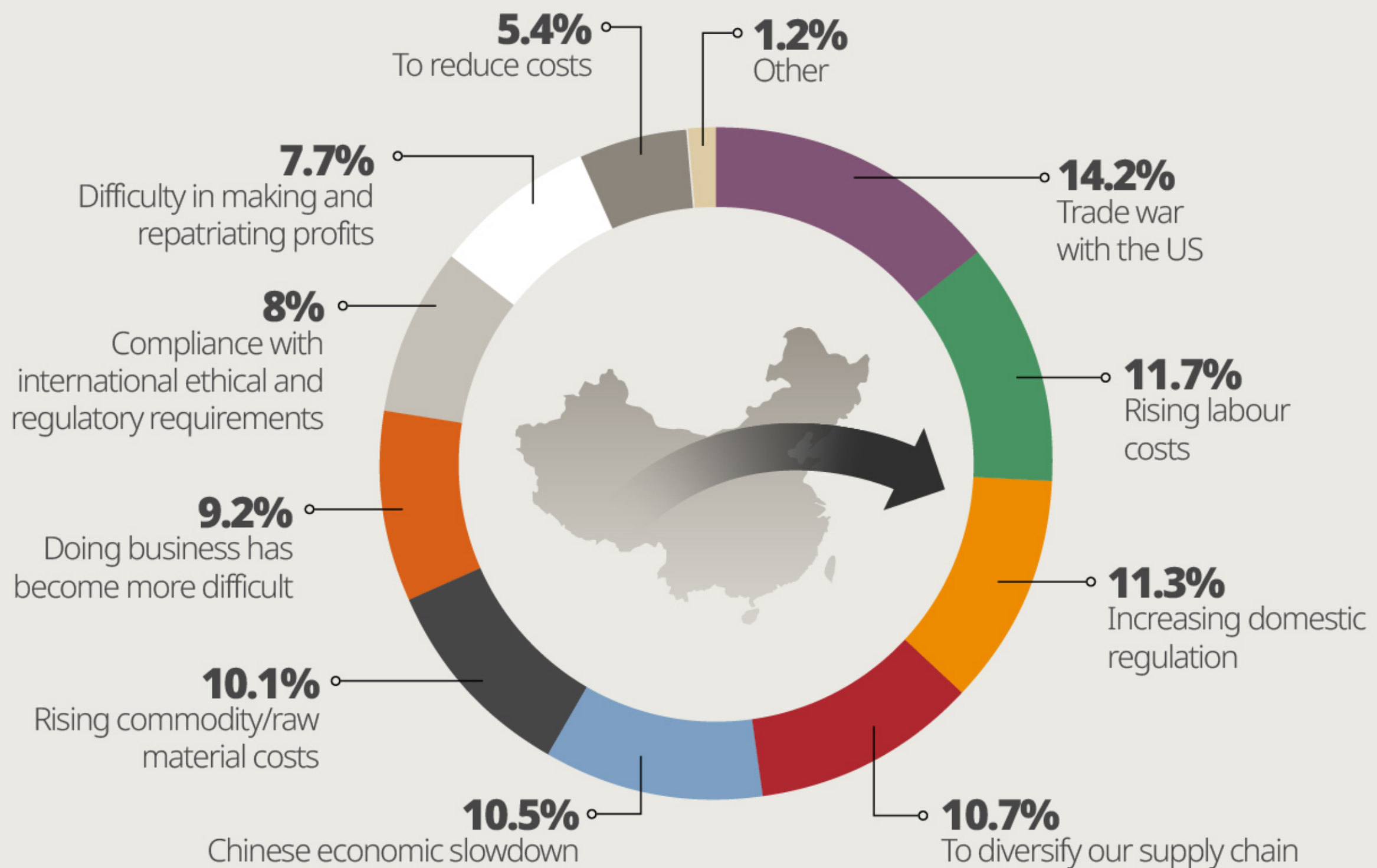


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China: Why Leave?

Why have you decided to move production/sourcing out of China or reduce investments in China?

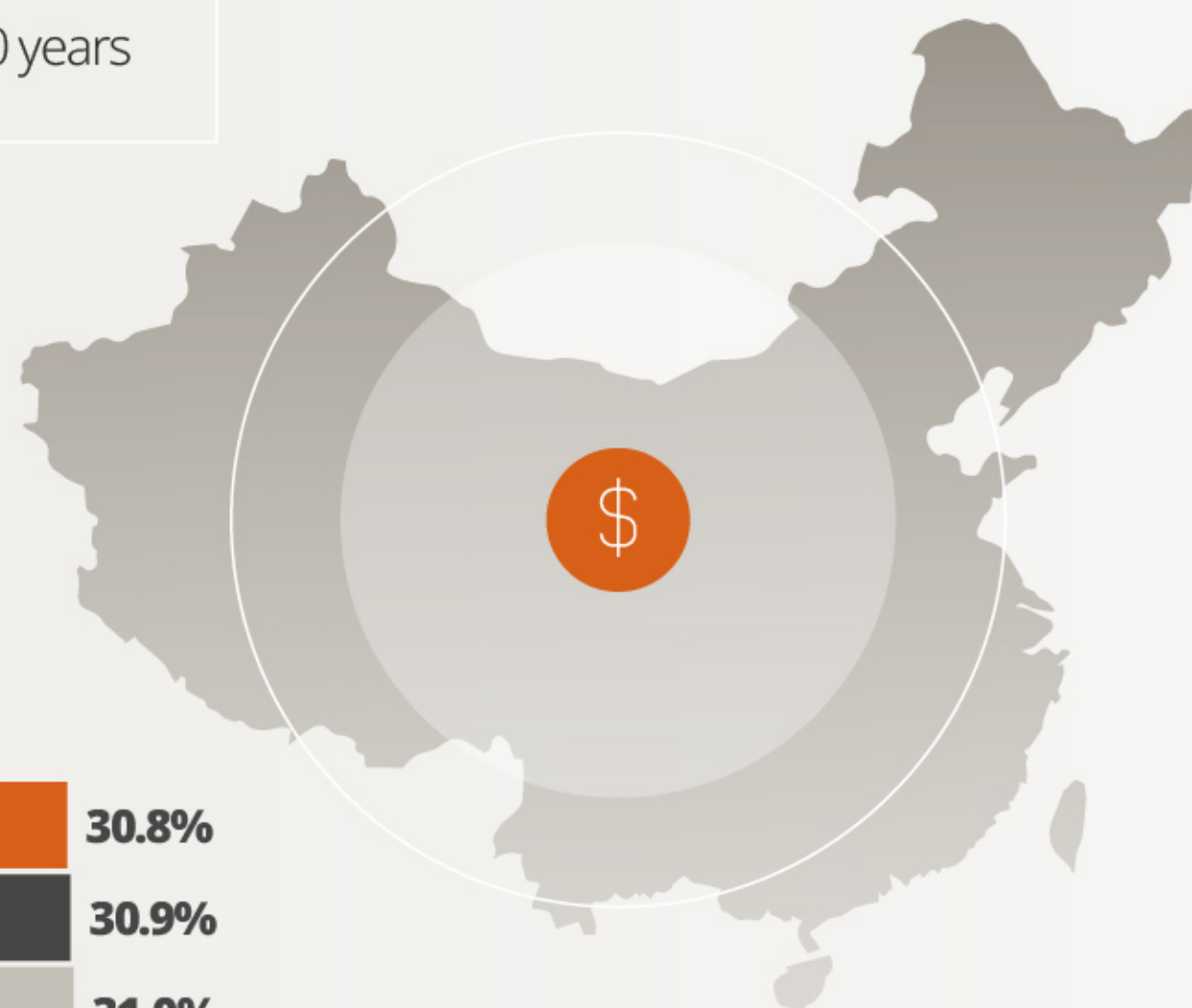
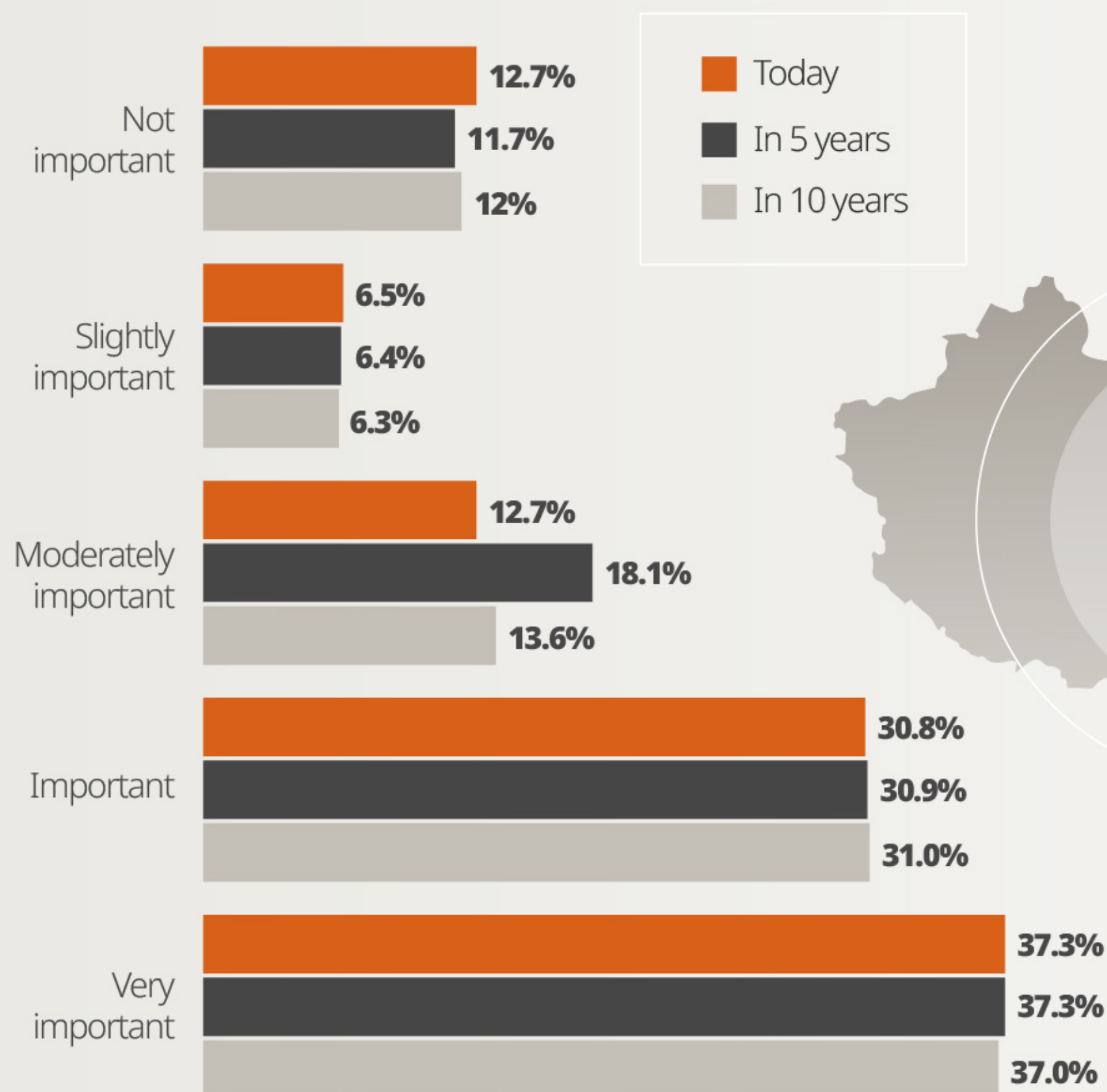


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China's Importance

How important is China to your investment strategy?

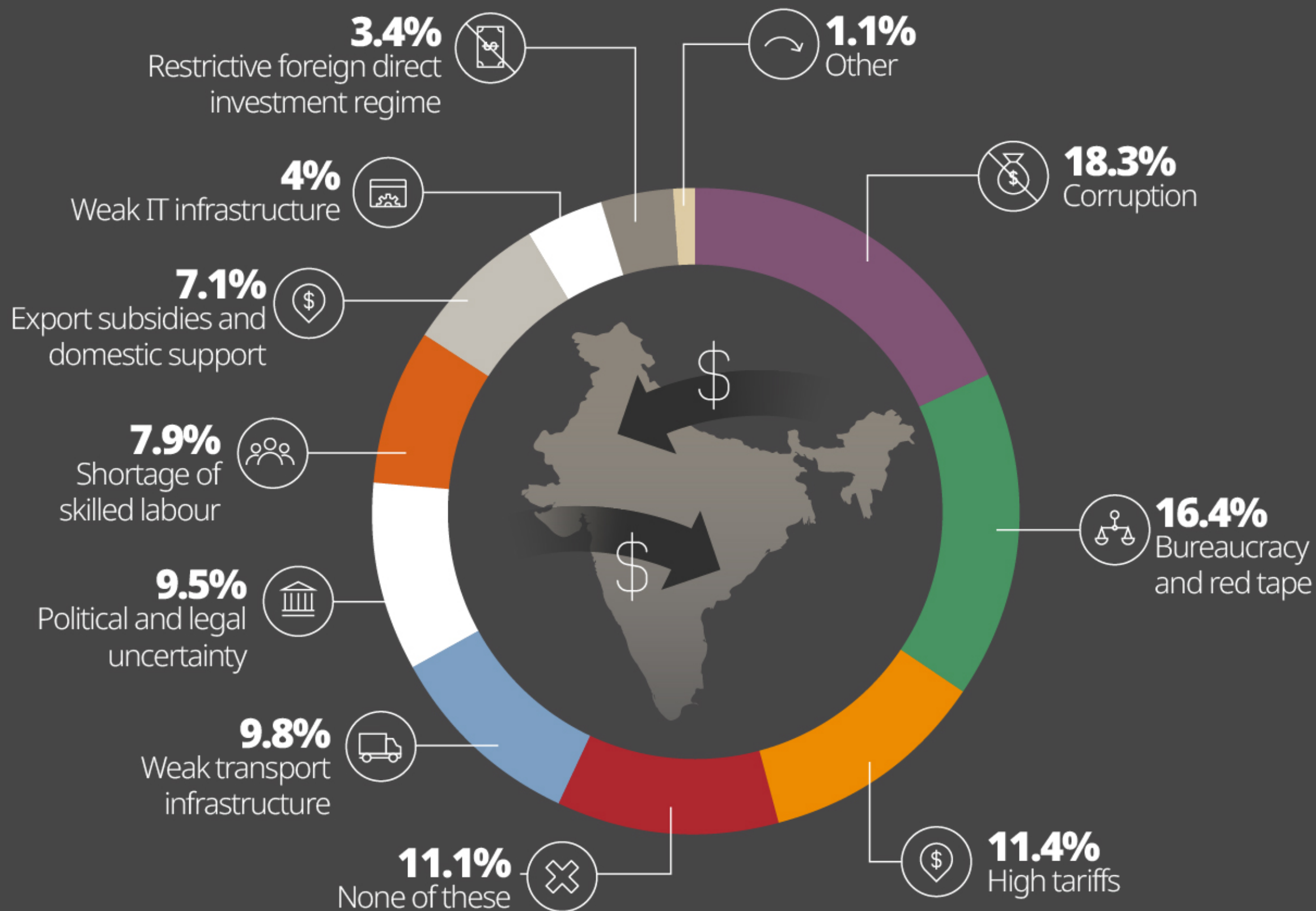


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Investing in India

What is the biggest investment barrier in India?

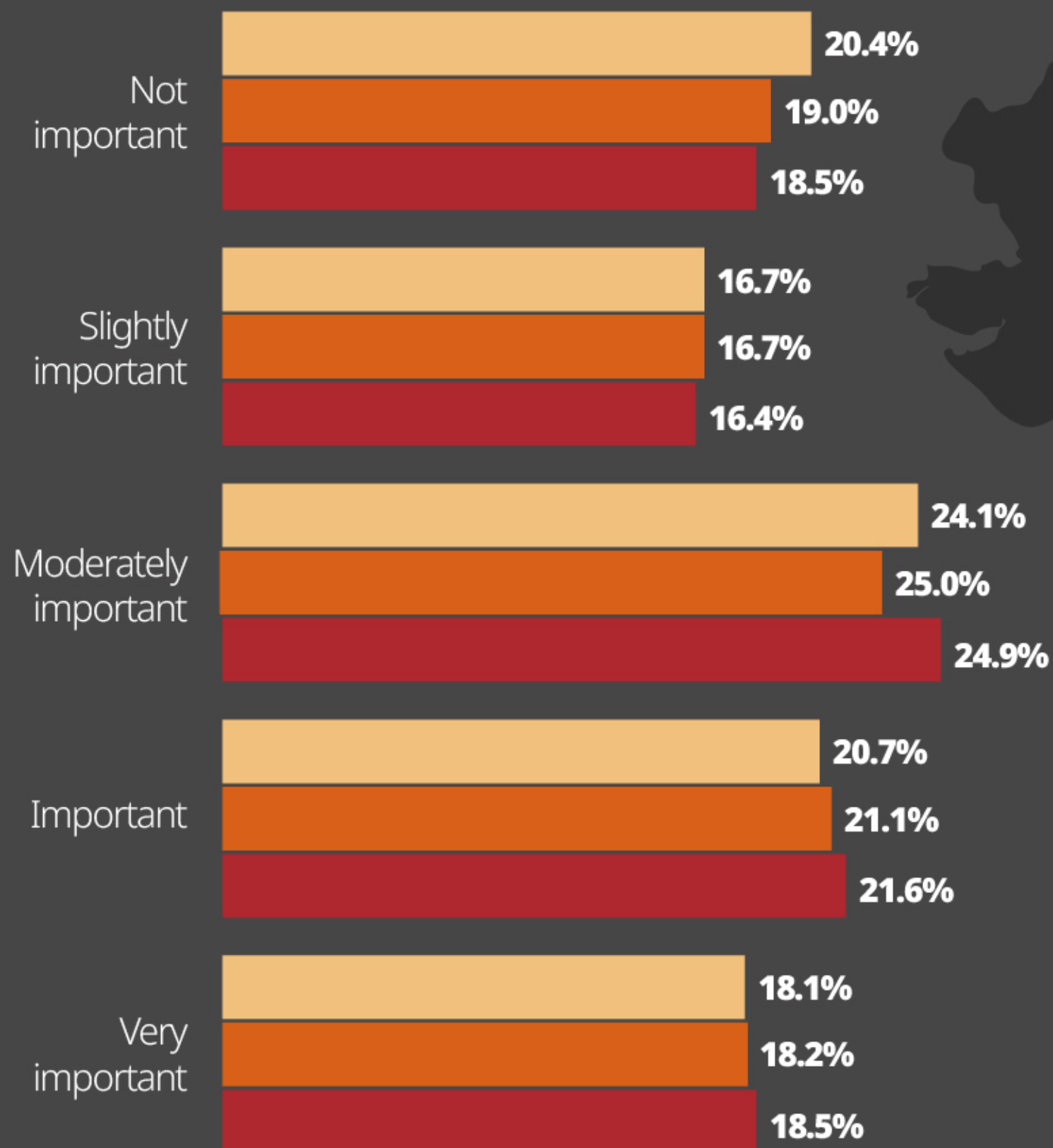


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India as Part of Strategy

How important is India to your investment strategy?

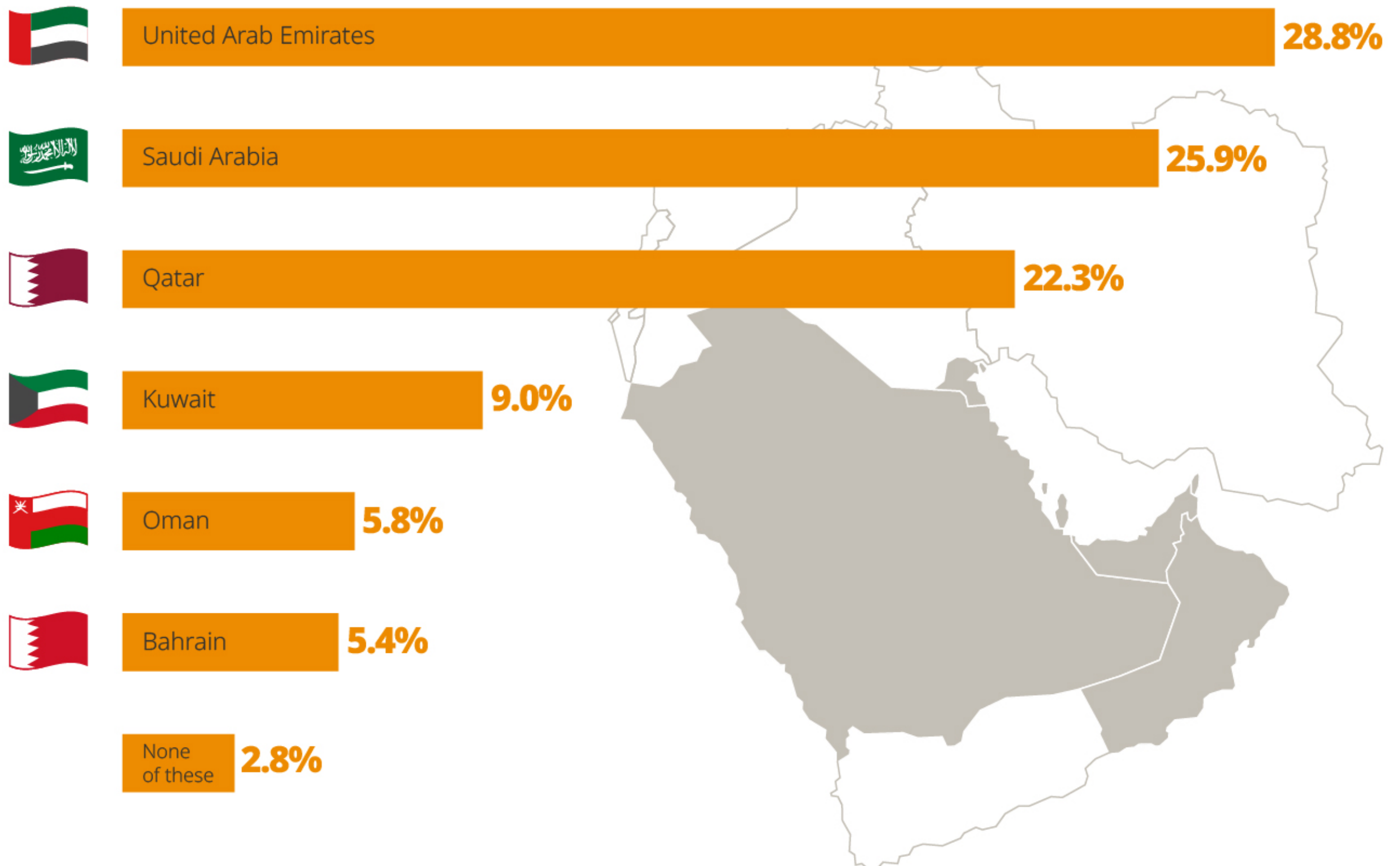


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Gulf Economic Diversification

Which Gulf Cooperation Council (GCC) countries have made the most progress in diversifying their economies?

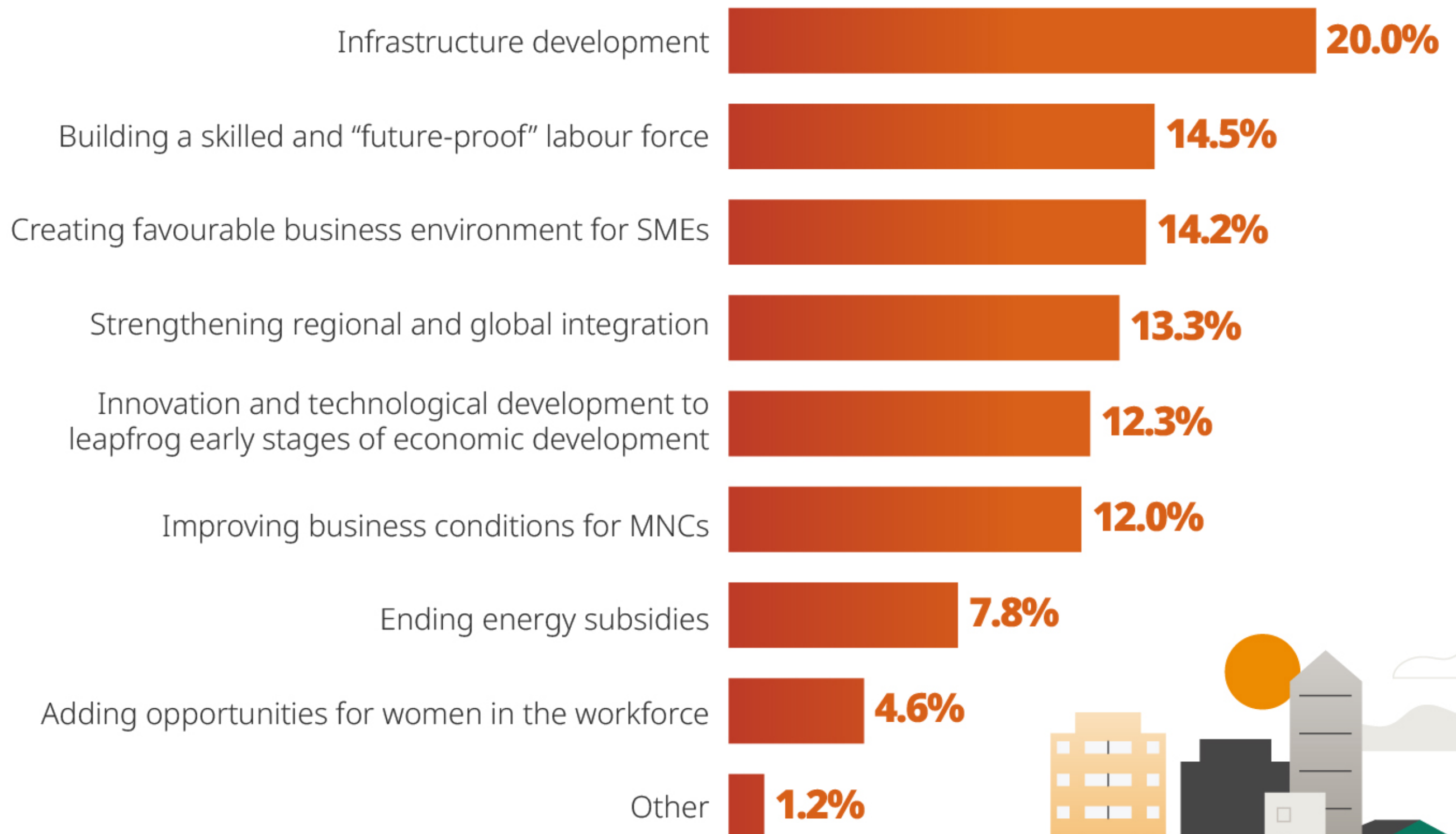


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Driving Gulf Diversification

What are the three most important drivers of economic diversification in the Gulf countries? Please rank in order of importance.

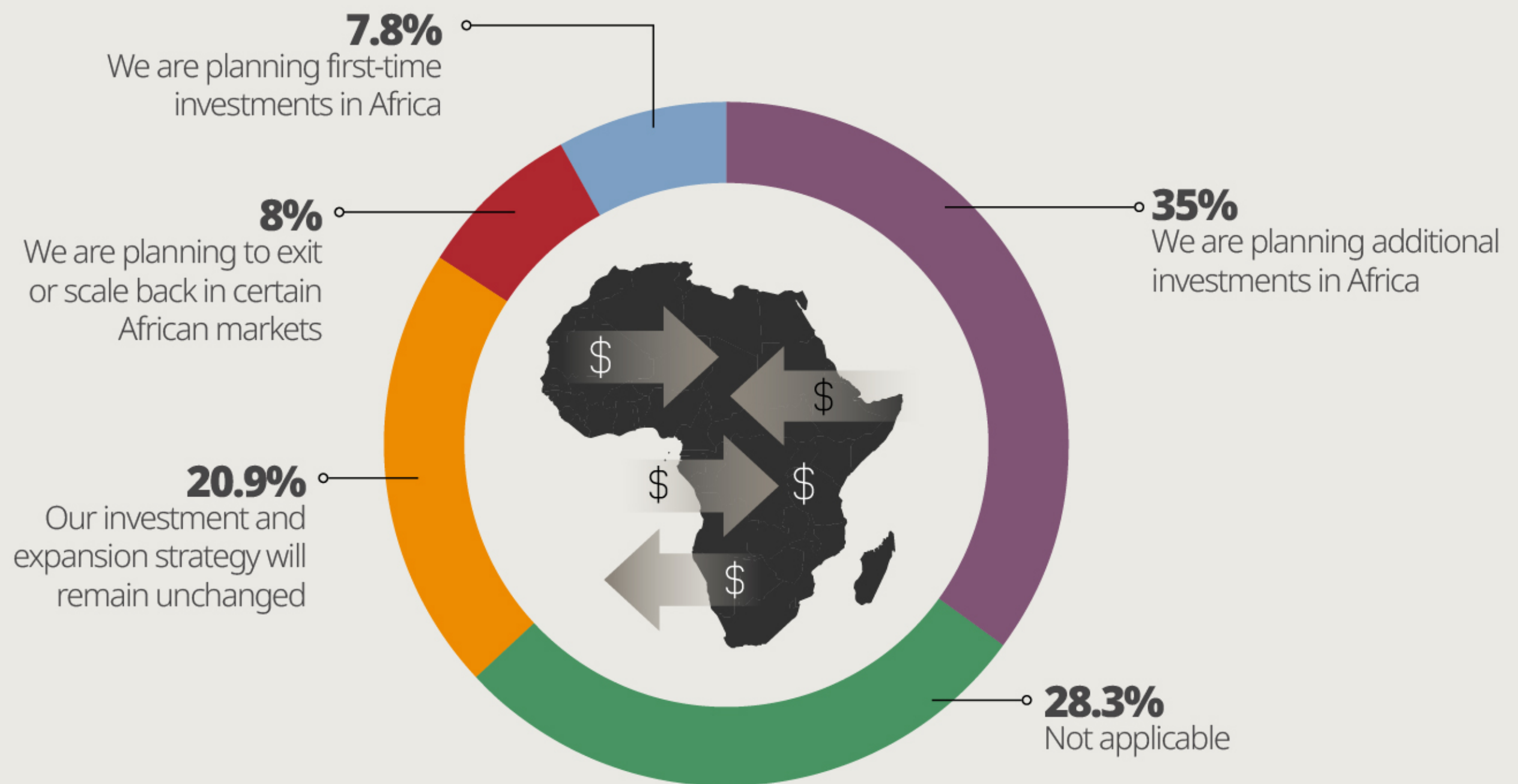


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Plans in Africa

How would you describe your company's investment and expansion strategy in Africa for 2025?

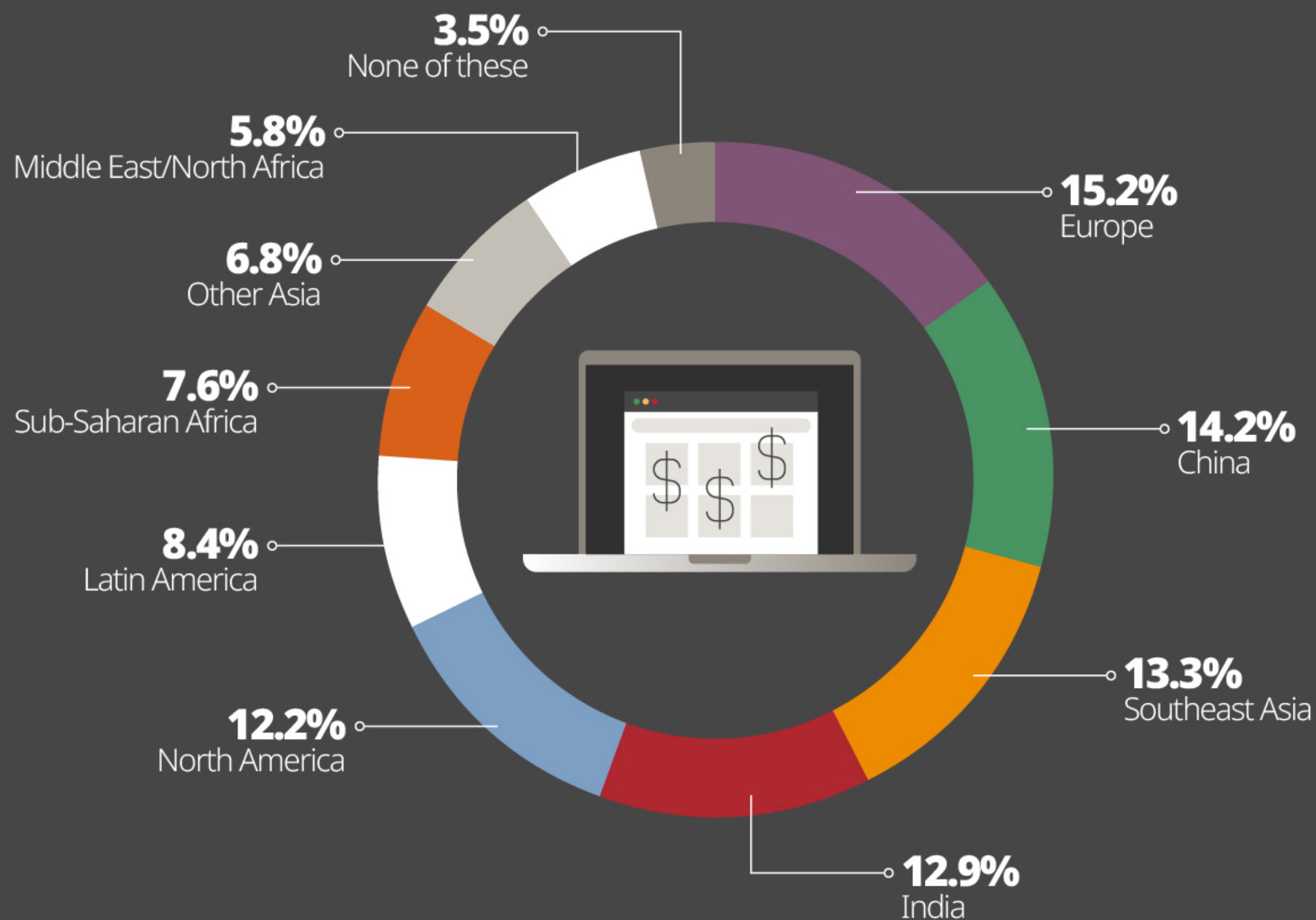


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E-Commerce

Where do you plan to expand e-commerce operations?



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Outlook for E-commerce

What do you expect to happen to the e-commerce market over the next 12 months?



45.0%

The market will grow significantly



36.3%

The market will grow slightly



9.2%

No significant change



5.7%

The market will decline slightly



1.1%

The market will decline significantly



2.7%

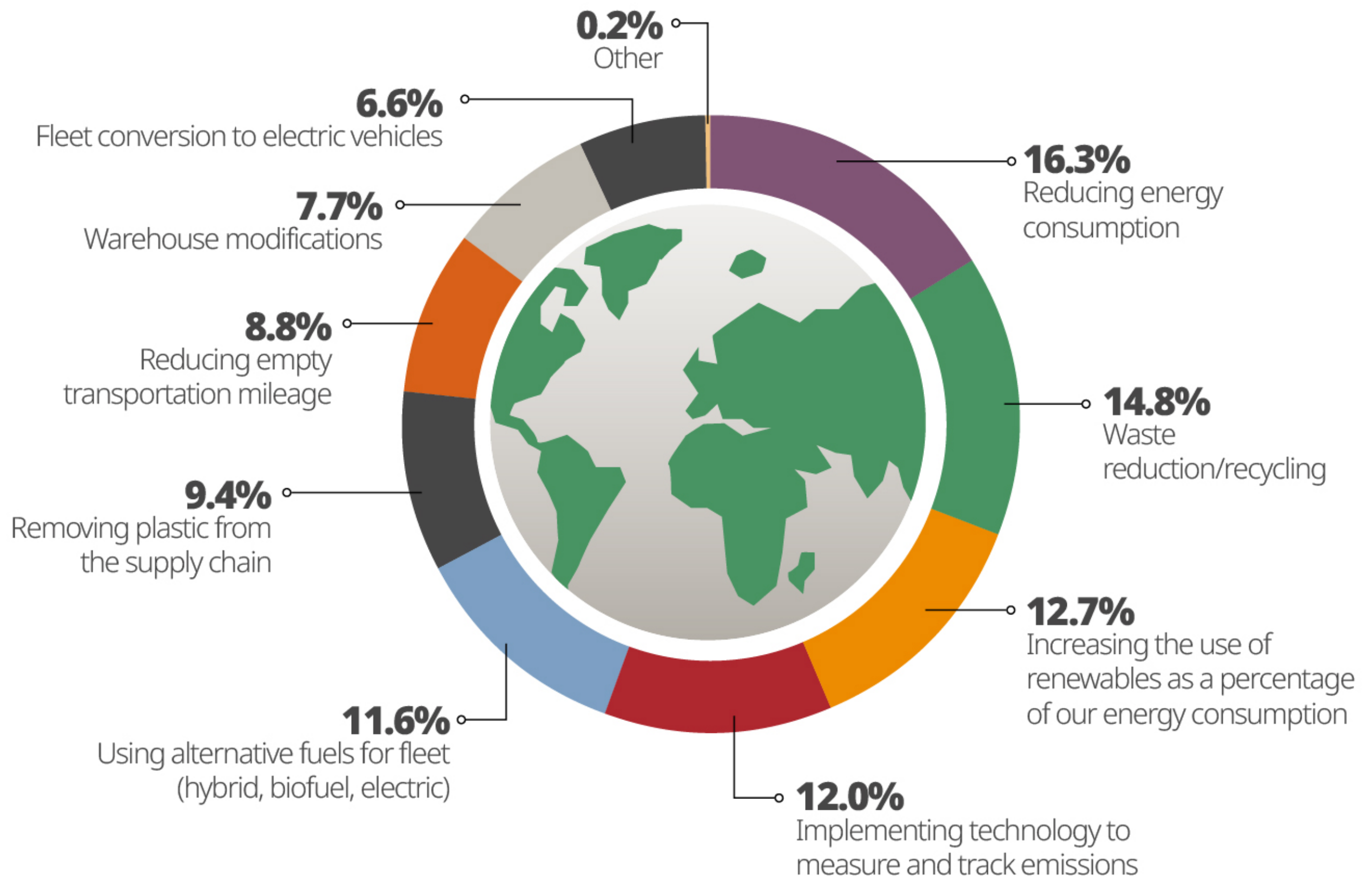
Unsure

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Sustainability

Which sustainability initiatives are among your 2025 priorities in emerging markets?

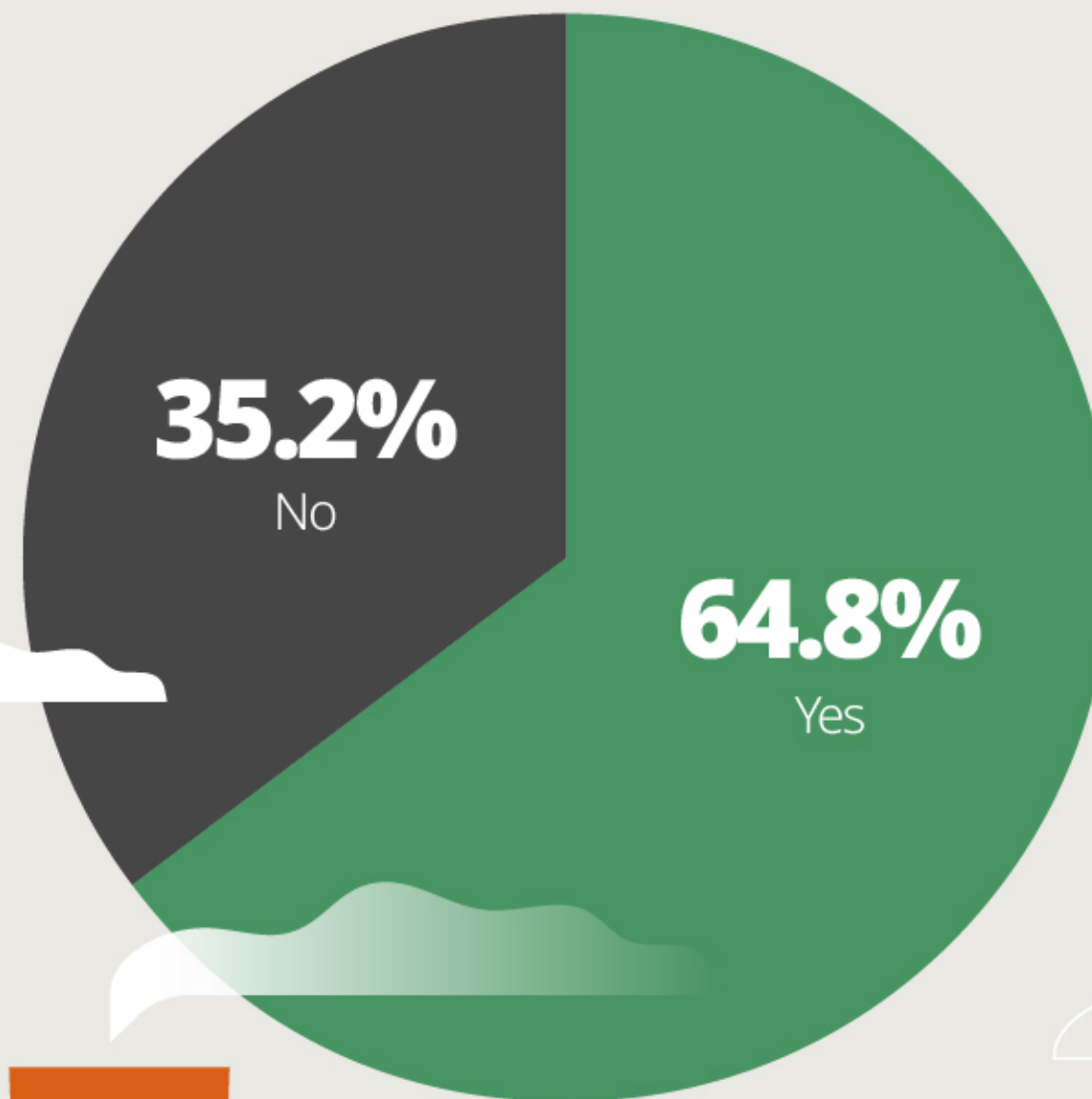


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On Pace for Net Zero

Are you currently on track to reach your Net Zero goals?



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Top 10 Emerging Markets in 2025

2025 Rank		Change
1	China	—
2	India	—
3	UAE	—
4	Saudi Arabia	▲ 2
5	Malaysia	▼ 1
6	Indonesia	▼ 1
7	Mexico	▲ 2
8	Qatar	▼ 1
9	Thailand	▲ 1
10	Vietnam	▼ 2





Top Emerging Markets in 2025



Top 5 Domestic Logistics Markets

2025 Rank	Change
1 China	—
2 India	—
3 Indonesia	—
4 Saudi Arabia	▲ 3
5 UAE	—



Top 5 International Logistics Markets

2025 Rank	Change
1 China	—
2 India	—
3 Mexico	▲ 2
4 Indonesia	—
5 Saudi Arabia	▲ 1



Best 5 for Business Fundamentals

2025 Rank	Change
1 UAE	—
2 Malaysia	—
3 Saudi Arabia	—
4 Jordan	▲ 1
5 Qatar	▼ 1



Digital Readiness

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

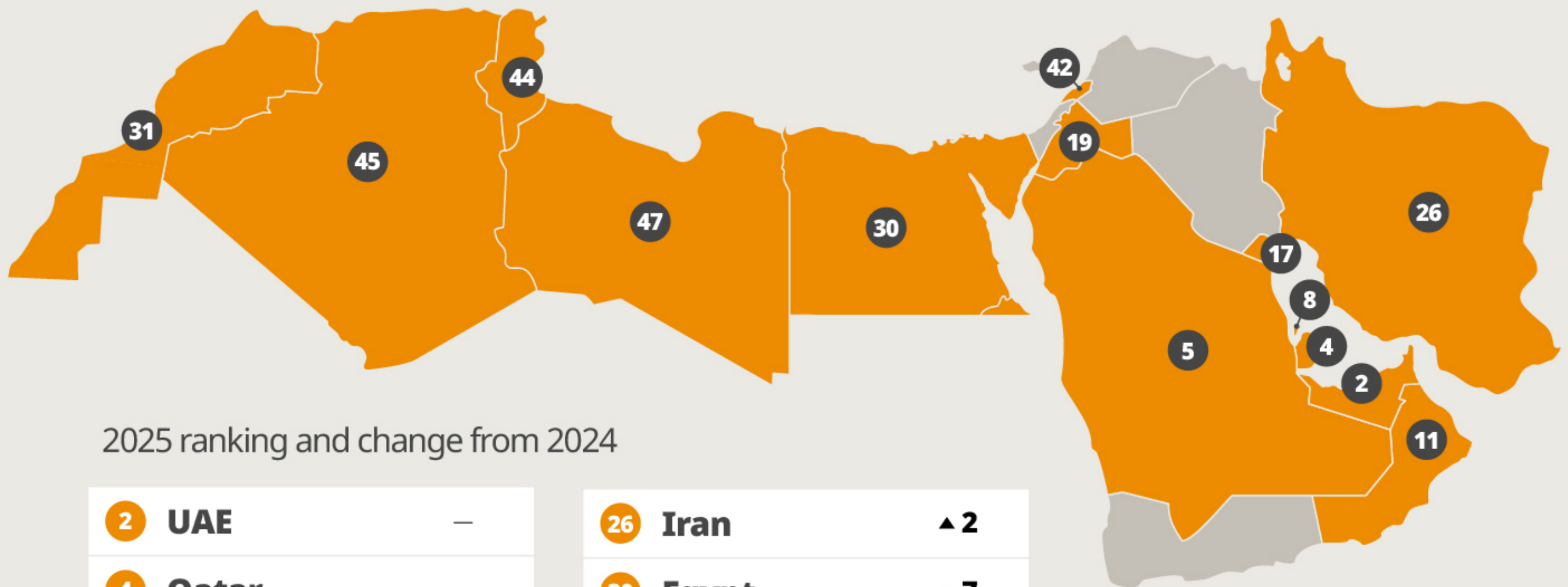
2025 Rank		Change from 2024
1	China	—
2	UAE	—
3	Malaysia	—
4	Qatar	—
5	Saudi Arabia	▲ 1
6	Thailand	▲ 1
7	India	▼ 2
8	Bahrain	▲ 8
9	Chile	▲ 5
10	Turkey	—





Digitally Ready in the Middle East and North Africa

How countries in the region rank for digital readiness



2025 ranking and change from 2024

2 UAE	—	26 Iran	▲ 2
4 Qatar	—	30 Egypt	▲ 7
5 Saudi Arabia	▲ 1	31 Morocco	▲ 1
8 Bahrain	▲ 8	42 Lebanon	▼ 9
11 Oman	▲ 2	44 Tunisia	▼ 2
17 Kuwait	—	45 Algeria	—
19 Jordan	—	47 Libya	▲ 3

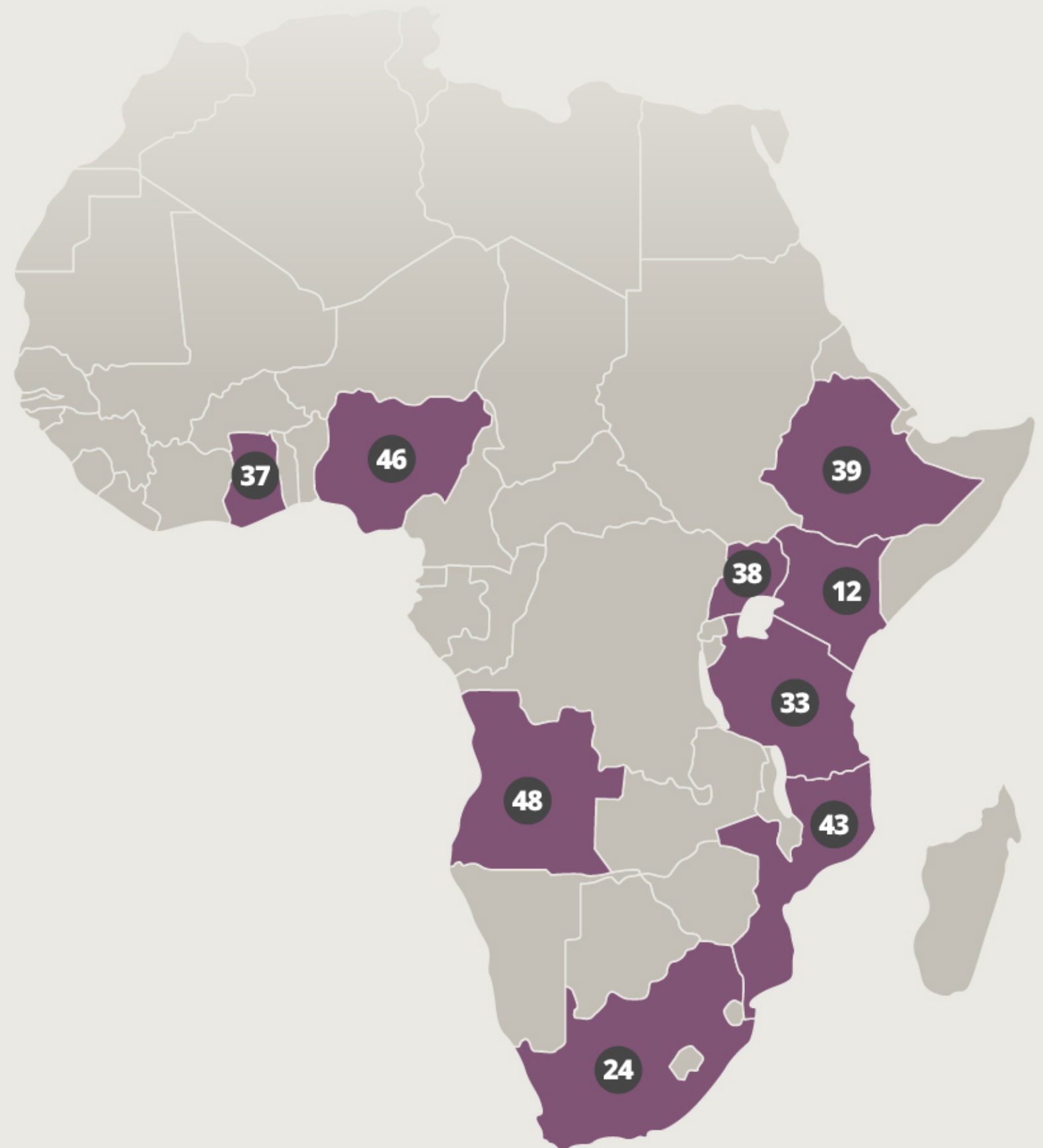


Digitally Ready in Sub-Saharan Africa

How countries in the region rank for digital readiness

2025 ranking and change from 2024

12	Kenya	▼ 3
24	South Africa	▲ 1
33	Tanzania	▲ 8
37	Ghana	▼ 1
38	Uganda	▲ 2
39	Ethiopia	▲ 5
43	Mozambique	▲ 4
46	Nigeria	▼ 7
48	Angola	▲ 1

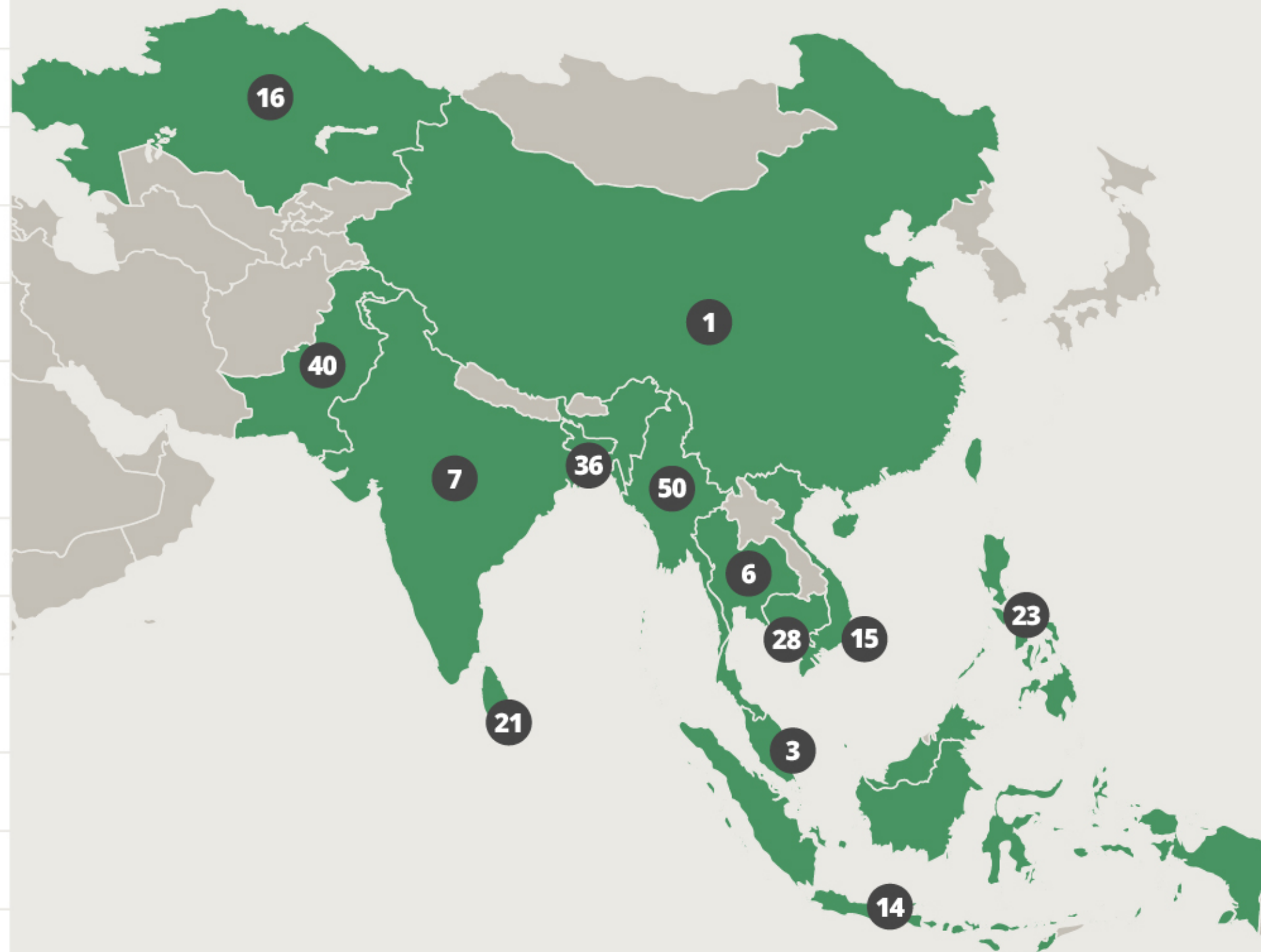




Digitally Ready in Asia

How countries in the region rank for digital readiness

1	China	—
3	Malaysia	—
6	Thailand	▲1
7	India	▼2
14	Indonesia	▼6
15	Vietnam	▲6
16	Kazakhstan	▼1
21	Sri Lanka	▼3
23	Philippines	▼11
28	Cambodia	▼5
36	Bangladesh	▼6
40	Pakistan	▼13
50	Myanmar	▼2





Gulf Business Fundamentals

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

2025 Rank	Change
1 UAE	—
3 Saudi Arabia	—
5 Qatar	▼ 1
6 Bahrain	▲ 2
8 Oman	▲ 3
11 Kuwait	▲ 6





Climbing the Rankings



Key Changes



Losing Ground in Key Areas

Ethiopia	▲ 19	International Logistics	▼ 15	Lebanon
Iran	▲ 15		▼ 12	Kazakhstan
Algeria	▲ 14		▼ 12	Bahrain
Venezuela	▲ 20	Domestic Logistics	▼ 13	Nigeria
Kuwait	▲ 8		▼ 11	Pakistan
Angola	▲ 8		▼ 9	Bangladesh/Jordan/ Kazakhstan/Ethiopia
Bahrain	▲ 8	Digital Readiness	▼ 13	Pakistan
Tanzania	▲ 8		▼ 11	Philippines
Egypt	▲ 7		▼ 9	Lebanon
Cambodia	▲ 8	Business Climate	▼ 7	Egypt
Colombia	▲ 7		▼ 6	Turkey
Myanmar	▲ 7		▼ 5	Ghana/Sri Lanka/Argentina





United Arab Emirates: Logistics Standout

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

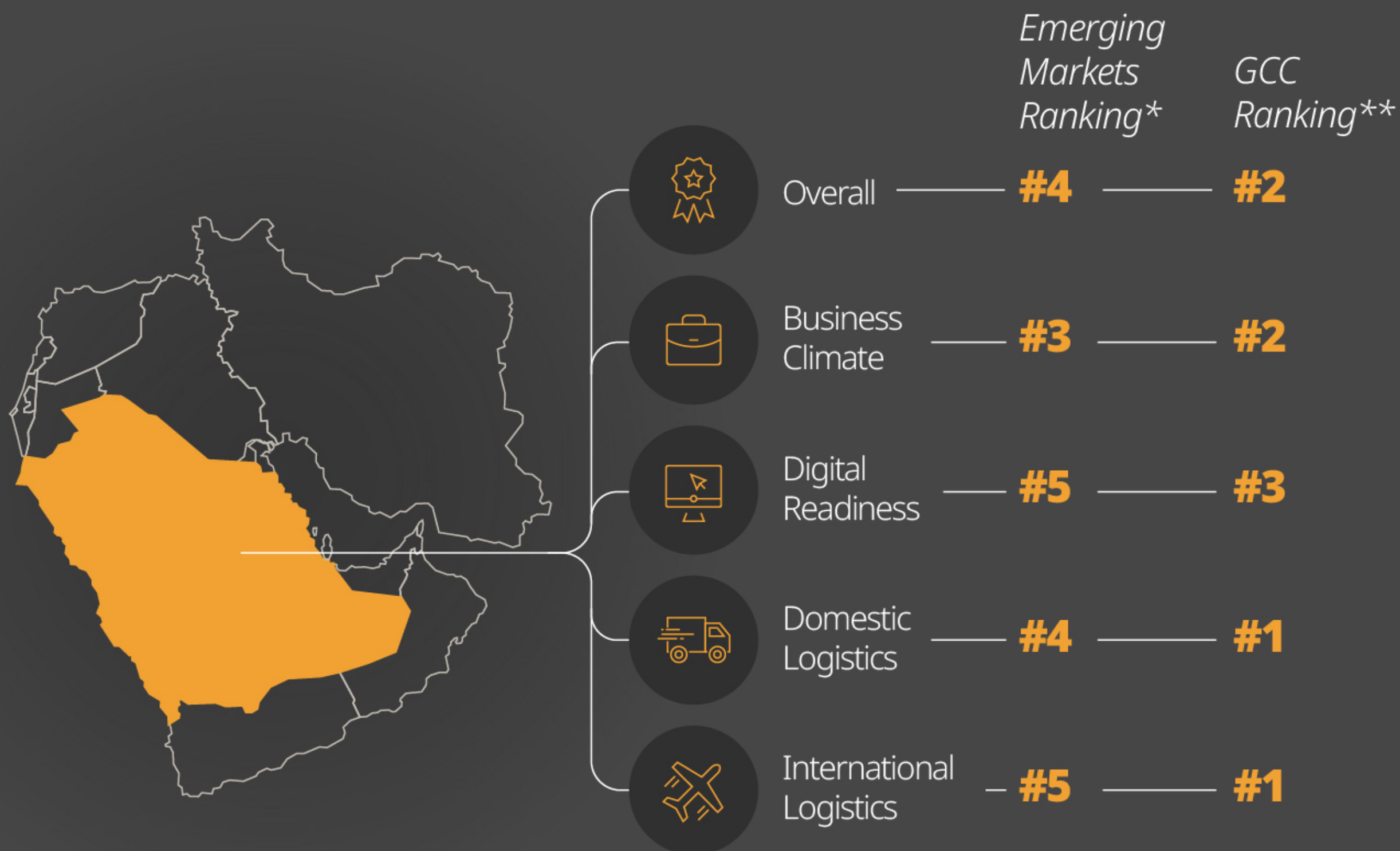


*ranking in 50-country Index **ranking in six-country GCC



Saudi Arabia: Logistics Leader

Saudi Arabia is becoming a regional and global logistics leader. Where it ranks vs. the world's emerging markets and its GCC neighbors



*ranking in 50-country Index **ranking in six-country GCC