



# 2022 Global Freight Resilience Index

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# 2022 Global Freight Resilience Index results

Rank	Country	Score
1	Singapore	85.6
2	Netherlands	82.0
3	UK	79.2
4	Denmark	79.1
5	Switzerland	79.1
6	UAE	78.0
7	Germany	77.7
8	Sweden	77.6
9	USA	76.6
10	Finland	75.6
11	New Zealand	74.4
12	Austria	74.3
13	Ireland	73.0
14	Japan	72.9
15	France	72.8
16	Belgium	72.6
17	Estonia	72.5
18	Spain	71.4
19	Norway	71.3
20	Korea	71.3
21	Malaysia	71.2
22	Czechia	69.9
23	Italy	69.2
24	Australia	68.6
25	Canada	68.6
26	Slovenia	68.6
27	China	68.6
28	Portugal	68.3
29	Qatar	68.0
30	Lithuania	67.8
31	Poland	67.6
32	Hungary	67.1
33	Cyprus	66.2
34	Israel	66.2
35	Thailand	66.1
36	Slovakia	65.8
37	Chile	65.3
38	Bahrain	64.9
39	Romania	64.9
40	Saudi Arabia	64.6
41	Vietnam	64.3
42	Latvia	64.0
43	Oman	63.4
44	Turkey	62.8
45	Bulgaria	62.8
46	Mauritius	62.2
47	South Africa	61.4
48	India	61.1
49	Russia	60.7
50	Azerbaijan	60.6

Rank	Country	Score
51	Croatia	60.5
52	Kazakhstan	60.4
53	Georgia	59.9
54	Kuwait	59.9
55	Mexico	59.9
56	Greece	59.8
57	Indonesia	59.8
58	Panama	59.8
59	Serbia	59.1
60	Morocco	58.6
61	Ukraine	58.3
62	Costa Rica	57.7
63	Botswana	57.6
64	Peru	57.1
65	Armenia	57.0
66	Colombia	56.8
67	North Macedonia	56.3
68	Philippines	56.2
69	Uruguay	56.1
70	Rwanda	55.3
71	Namibia	55.3
72	Tunisia	55.3
73	Jordan	55.1
74	Moldova	54.9
75	Kenya	54.5
76	Kyrgyzstan	53.8
77	Albania	53.4
78	Ghana	53.4
79	Jamaica	52.8
80	Brazil	52.7
81	Dominican Republic	51.9
82	Paraguay	51.7
83	Argentina	51.7
84	Cambodia	51.6
85	Egypt	51.4
86	Guatemala	51.2
87	Sri Lanka	51.0
88	Mongolia	50.6
89	Senegal	50.6
90	El Salvador	50.5
91	Trinidad & Tobago	50.4
92	Ecuador	50.1
93	Myanmar	49.3
94	Nicaragua	48.8
95	Benin	48.3
96	Honduras	48.2
97	Laos	48.1
98	Pakistan	47.7
99	Zambia	47.7
100	Malawi	47.5

Source: Whiteshield, 2022 Global Freight Resilience Index top 100

# About the Global Freight Resilience Index

The Index is a ranking of countries that illustrates their potential to improve freight, trade, and logistics. The Index comprises two pillars: Policy Opportunity and Freight Performance. It takes into consideration indicators at the country-level:

- The **policy opportunity pillar** analyses a country's current macro-environmental factors, in particular, its institutional, economic, social, and technological factors. Indicators in this pillar evaluate a government's conduciveness to trade by assessing its overall economic resilience.
- The **freight performance pillar** analyses a country's performance in trade, freight and logistics. Indicators in this pillar evaluate the level of service and the relative success in trade and logistics

performance.

- The **urgency to act** provides a measure of the magnitude of misalignment between a country's policy opportunity and freight performance indicators and thus its need to take critical actions.

Countries with high freight resilience have macro-economic environments that effectively leverage their logistics infrastructure to create global trade opportunities. They convert these opportunities into tangible results by providing advantages in cost, time and service delivery.

## Methodology overview

The 2022 Global Freight Resilience Index evaluates 130 countries based on more than 40 country-level indicators that once aggregated result in eight equally-weighted categories creating the two pillars of the Index.

All criteria evaluated were normalized on a 1 to 100 scale, where 1 indicates the worst value and 100 the best. The policy opportunity and freight performance pillars were assigned a weight of 50% each.

### The Global Freight Resilience Index framework 2022

1.1 Institutional improvement  
1.2 Economic development  
1.3 Technological readiness

**Policy Opportunity**

**GFRI**

**Freight Performance**

2.1 Trade integration and facilitation  
2.2 Trade outputs  
2.3 Trade connectivity and infrastructure  
2.4 Logistics efficiency  
2.5 Logistics administration

Urgency to Act = Magnitude difference between 'Policy Opportunity' and 'Freight Performance'



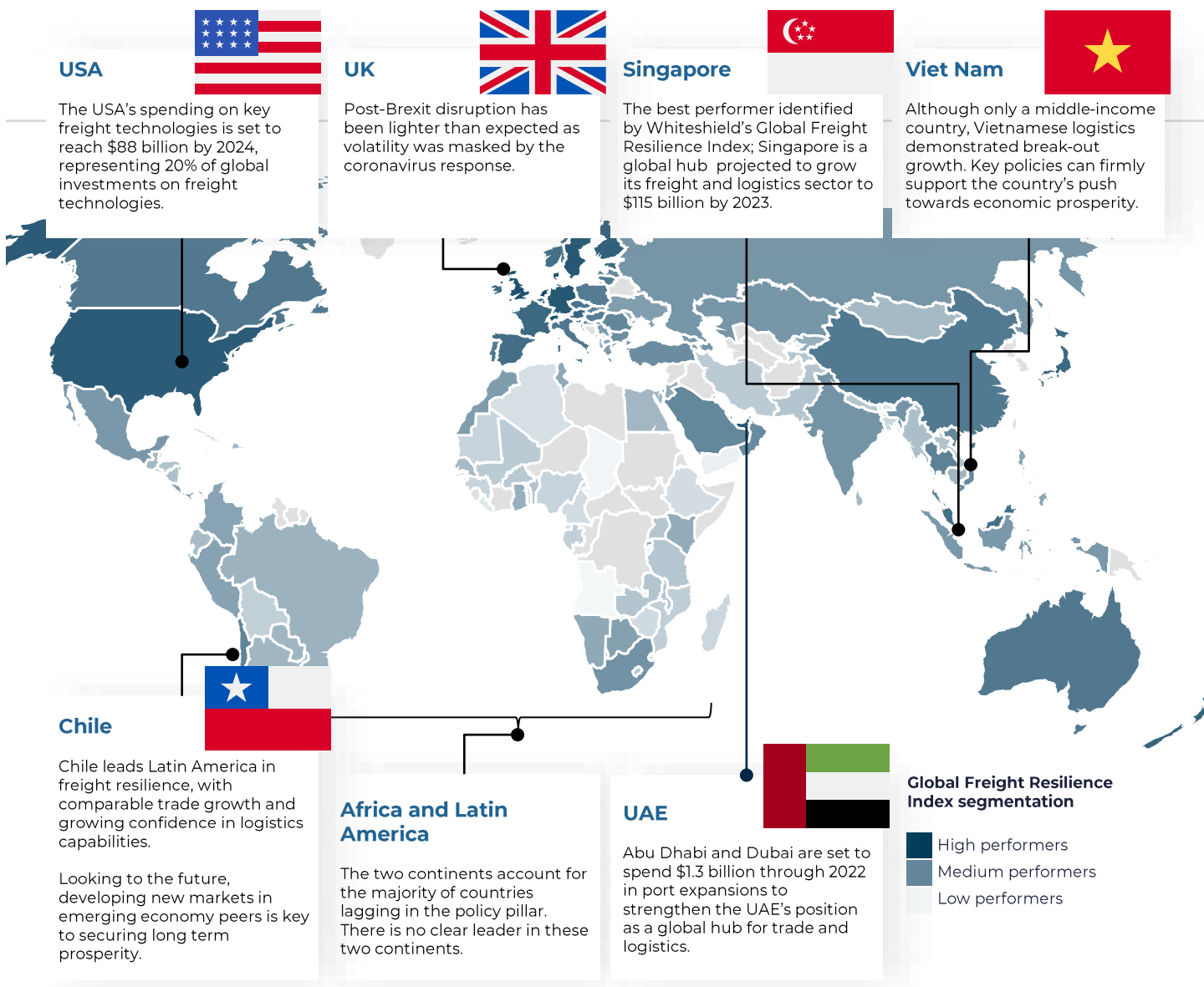
# Logistics Resilience is a key to overcoming crises

## Global Freight Resilience Index 2022 Heatmap

Europe, North America and Asian Tigers are the leading regions in terms of freight resilience.

The top-ranking basket of countries has remained stable over the past three years.

The most noticeable performers successfully capitalized on introduced policies and logistics expertise.



Source: Whiteshield. Countries are schematically divided into performance clusters based on their respective Global Freight Resilience Index 2022 scores.

Timely and accurate introduction of policies secures conditions for growth of logistics resilience.

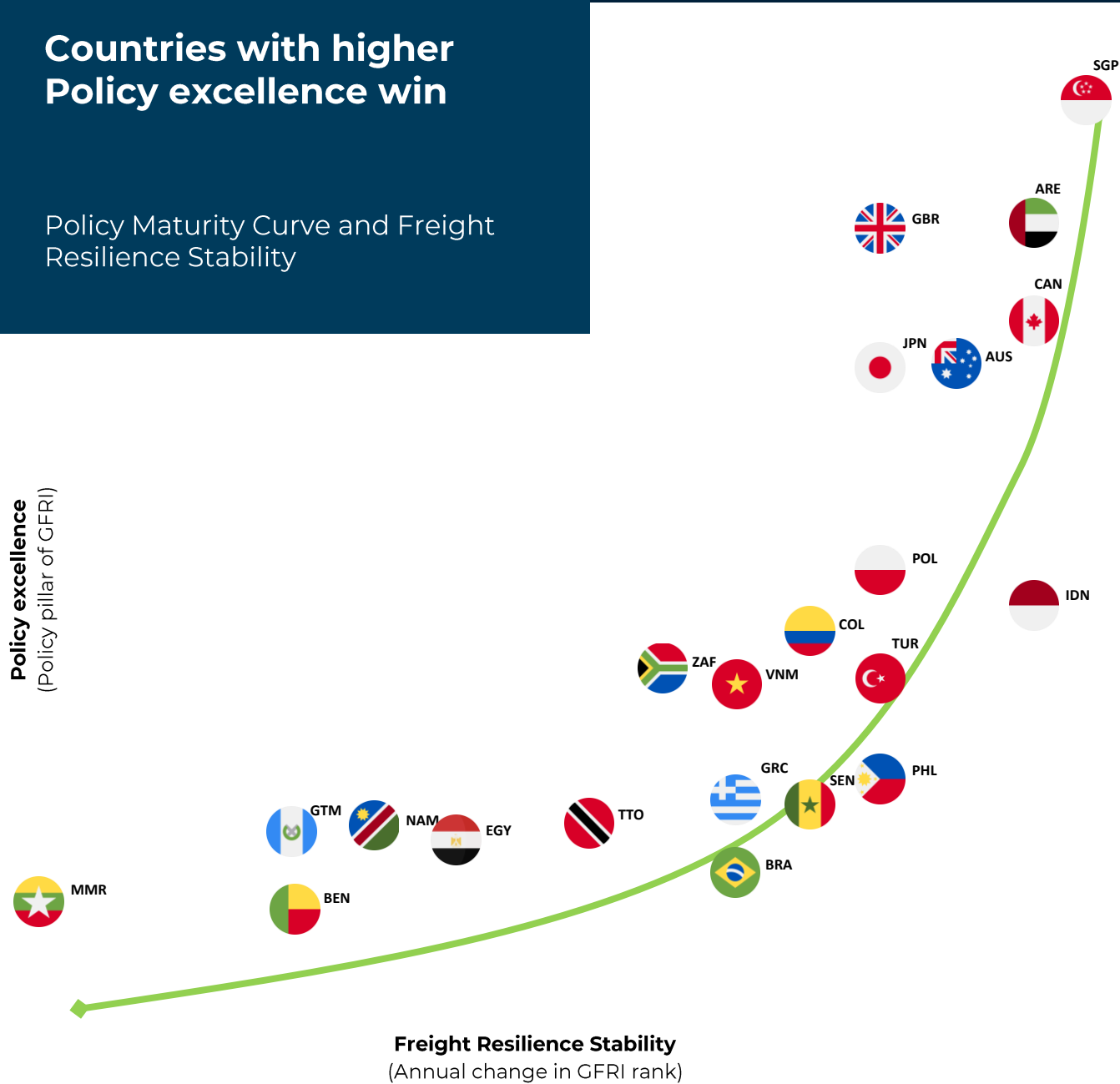
Countries with high policy maturity tend to be more stable in terms of freight resilience. In the long run policy introducers stay on top while those who underinvest in policies may fluctuate.

Countries with low policy excellence have greater marginal returns on policy, achieving higher resilience growth through fewer policy investments.

Moving along the maturity curve, countries need to consequently introduce new types of policies to keep scaling.

# Countries with higher Policy excellence win

Policy Maturity Curve and Freight Resilience Stability



Source: Whiteshield. Vertical axis represents values of countries' Policy pillar in the 2022 Global Freight Resilience Index. Horizontal axis represents absolute change in countries' GFRI rank compared between the 2021 and 2022 Index results..

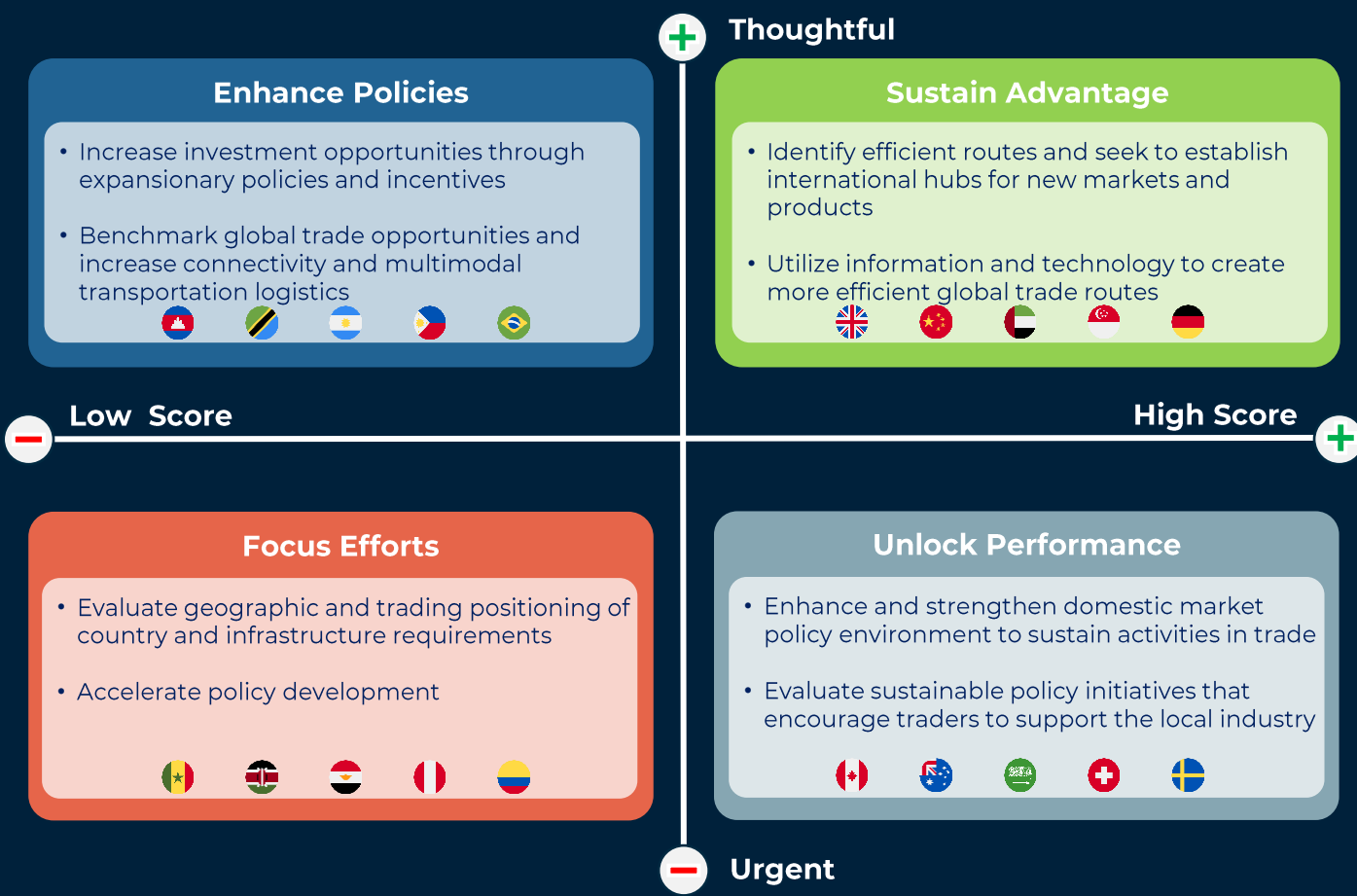
# To conquer the challenges, countries need to act quickly

Countries should swiftly strategize policy actions given their Freight Resilience Index score and balance between the pillars.

Economies with disproportional scores in Policy Opportunity and Freight Performance need urgent action while countries with balanced scores require more thoughtful solutions.

## Time Challenge

Freight - Reaction Speed Matrix

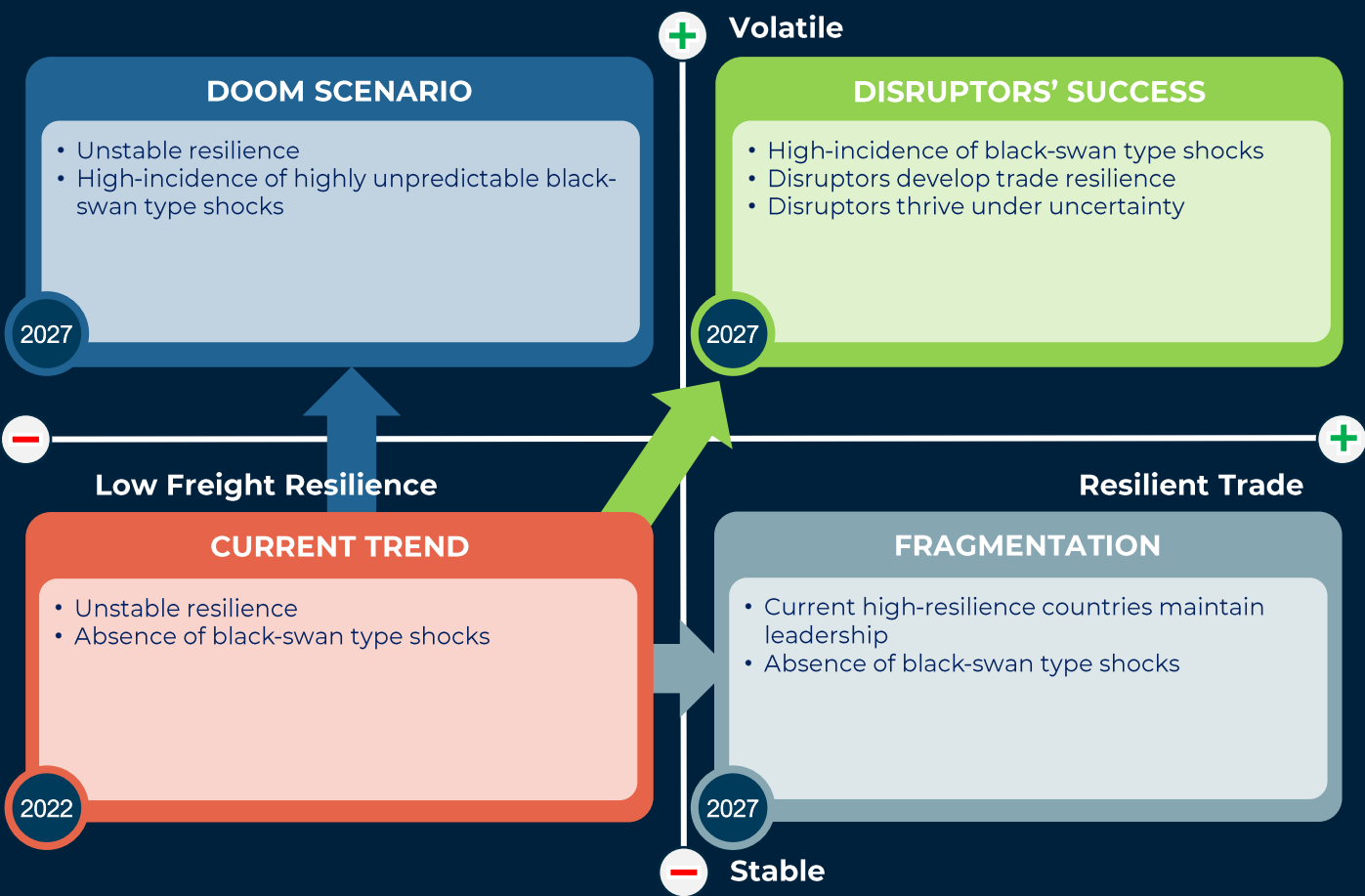


Source: Whiteshield. Countries are allocated by quadrants based on their respective Global Freight Resilience Index scores (total) and Urgency to Act sub-pillar scores (see methodology). The vertical axis represents the value of the Urgency to Act pillar, which is an absolute difference between the country's score in the Policy and Performance pillars of the Index. Horizontal axis represents the total 2022 Global Freight Resilience Index score.



# Future Scenarios

Potential future scenarios based upon volatility and logistics resilience



Source: Whiteshield. Scenarios are allocated by quadrants based on the intensity of possible future shocks and countries' level of resilience. In the freight & logistics space The vertical axis represents the level of intensity of upcoming shocks, while the horizontal axis represents the level of freight resilience.

Future scenarios of global trade vary depending on a country's level of trade resilience and occurrence of unpredicted exogenous shocks.

Regional COVID outbreaks, political instabilities, natural and industrial disasters all have certain attributes of Black Swan events that may change the rules of the game dramatically.

Regardless of the nature and magnitude of such shocks, investing into policies and logistics infrastructure would help countries to become more resilient and hence to adapt to unexpected changes with higher pace.

Countries that intensively invest into policies will become future disruptors and have higher chances for long run success.

# China:

## How to turn challenges into opportunities

China famously uses a 100-Year Marathon development plan to guide future growth, but also **adapts to new strategic opportunities**.

Since the beginning of the year, China has **developed overland and air bypass routes** around Russia to Europe with partners in Kazakhstan and Dubai.

These routes rapidly safeguard the EUR 700 Bn **bilateral trade** between the blocs.

### Disruption Case Examples

Managing risk or seizing opportunity



## New Zealand:

### Choosing safety

New Zealand's pandemic response is **textbook risk management**, minimizing health impact.

This laudable effort has **saved lives** at a rate superior to the rest of the OECD.

However, New Zealand's GFRI score is the second worst impacted in the OECD, and its **GDP growth forecast is the lowest in the OECD**.



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