



Burkina Faso

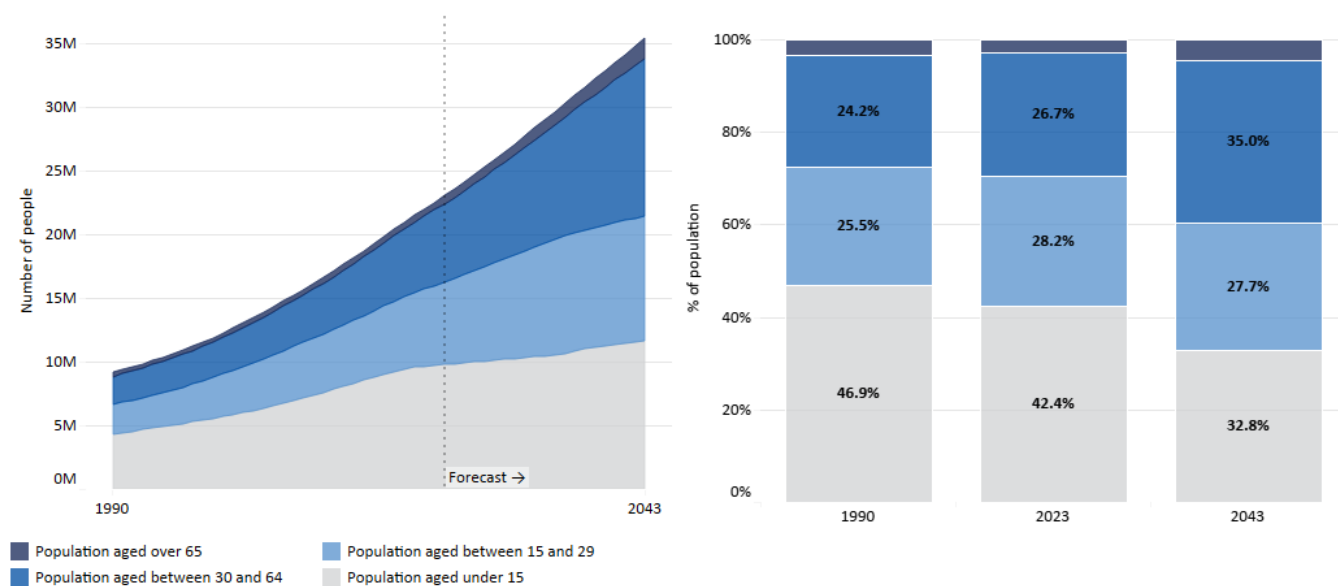
Burkina Faso: Current Path

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Last updated 21 February 2025 using IFs v8.34

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Chart 2: Population structure in the Current Path, 1990-2043



Source: IFs 8.34 initialising from UNPD population prospects estimate and WDI population data

Chart 2 presents the Current Path of the population structure, from 2019 to 2043.

The characteristics of a country's population can shape its long-term social, economic and political foundations; thus, understanding a nation's demographic profile indicates its development prospects.

Citizens of Burkina Faso, regardless of their ethnic origin, are collectively known as Burkinabé. The major ethnolinguistic group of Burkina Faso is the Mossi. French is the official language, and Moore, the language of the Mossi, is spoken by a large majority of the population.

The population of Burkina Faso is growing rapidly at about 3 per cent per year. In 2023, the country's population was estimated at 23 million, and on the Current Path, it will reach 27.1 million by 2030 and 35.3 million by 2043. This represents about 12 million more people over the next 20 years.

Contraception use was estimated at 31.2% of women in their reproductive age in the country in 2023. On the Current development trajectory, it will increase to 36.7% by 2030.

With a total fertility rate estimated at 4.2 children per woman in 2023, Burkina Faso has the 12th-highest fertility rate in Africa and slightly below the average of 4.8 children per woman for low-income countries in Africa in the same year. On the Current Path, Burkina Faso's fertility rate will decline slightly to 3.7 children per woman in 2030 and about 2.8 children per woman by 2043.

Burkina Faso's population is very youthful. With a median age of about 18 years in 2023, Burkina Faso has the 12th-youngest population in Africa, and its median age will modestly increase to 20 years in 2030 and 24 years by 2043.

Due to this youthful age structure, the dependency ratio is high, as a large portion of the population depends on the small workforce to provide for its needs—this constrains savings and investment in human and physical capital.

As of 2023, about 42.4% of the country's population was under 15 years of age. On the Current Path, the population below 15 will decline but will still constitute about 37.7% in 2030 and 32.7% in 2043. The share of the elderly (65 and above) has been stable over time — at about 2.7% in 2023— and will reach 3.2% in 2030 and 4.4% in 2043.

When the ratio of the working-age population to dependent is 1.7 or more, countries often experience more rapid economic growth, known as the **demographic dividend**, provided the workforce is appropriately skilled and absorbed in the labour market. Currently, the private sector's limited capacity makes it challenging to accommodate the large number of generally unskilled young job seekers in the country.

Burkina Faso is unlikely to reap its demographic dividend across the Current Path forecast horizon. The ratio of the working-age population to dependents stood at 1.2 in 2023—almost one working-age person for each dependent. It will only be at 1.4 in 2030 and 1.68 in 2043, slightly above the average of 1.5 for African low-income countries but still below the threshold of 1.7 that a country needs to enter a potential demographic window of opportunity. Burkina Faso only gets to this positive ratio at around 2044. However, Burkina Faso will enter this potential sweet spot almost a decade earlier than the average for low-income Africa.

Burkina Faso also has a large youth bulge at 48.9%. Youth bulge is the percentage of the population between 15 and 29 years old relative to those aged 15 and above. It will get to 48.4% in 2030 and reach 41.2% by 2043. In addition to the requirement for more spending on education, health services and job creation, large numbers of young adults can lead to positive political change in a country through youth activism, but they can also carry the seeds for socio-political instability in the absence of economic opportunities.

Chart 3: Population distribution map, 2023

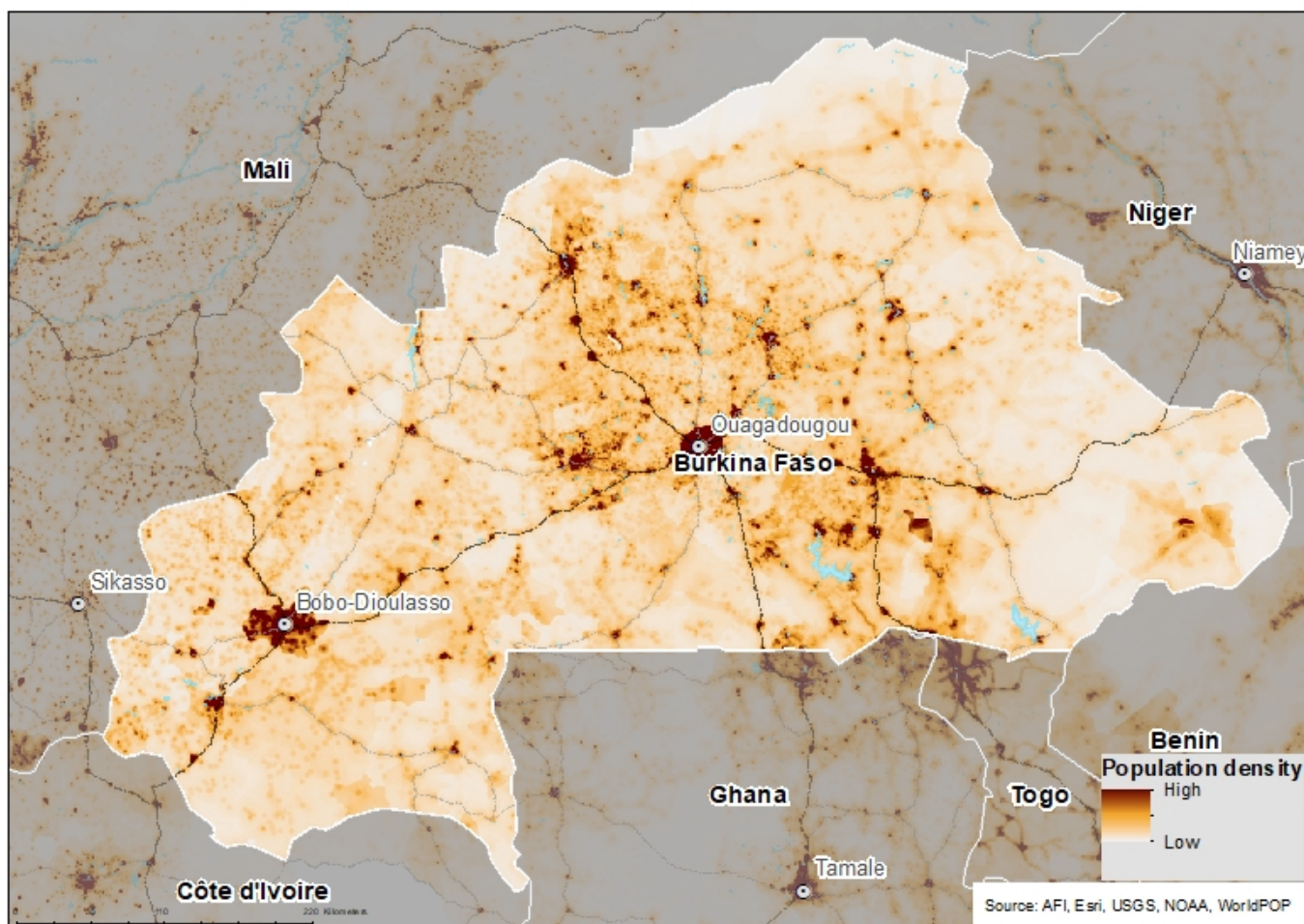


Chart 3 presents a population distribution map for 2023.

Burkina Faso has an average population density of about 0.8 persons per hectare in 2023. Population density is unevenly distributed, with higher concentrations in and around urban areas such as the capital, Ouagadougou, and Bobo-Dioulasso that also evidence more agricultural activity. Rural areas, especially in the northern and eastern regions (the Sahel region), have lower population densities. These areas are semi-arid, making them less hospitable for agriculture and currently impacted by insecurity. On the Current Path, Burkina Faso's population density will be about 1.0 and 1.3 people per hectare in 2030 and 2043, respectively.

Chart 4: Urban and rural population in the Current Path, 1990-2043

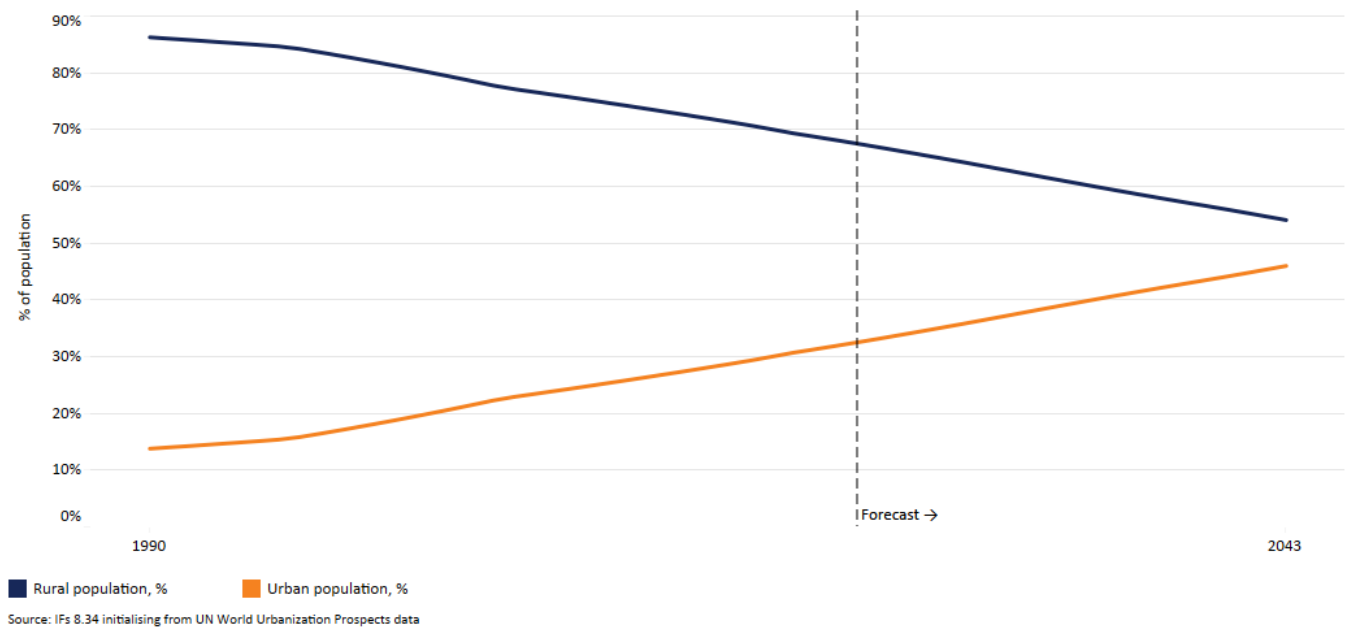


Chart 4 presents the urban and rural population in the Current Path, from 1990 to 2043.

Burkina Faso is late to the global trend of urbanisation similar to countries in the region. The population is largely rural at about 67.5% in 2023, on par with the average of 67.3% for low-income Africa. On the Current Path, the rural population will reduce by about 13 percentage points to reach 54% by 2043. This means the urbanisation rate increases from about 32.5% in 2023 to 36.8% in 2030, and 45.9% by 2043.

If well planned, urbanisation can be critical to economic growth and development, as it fosters entrepreneurship and increases productivity. However, limited supply of energy, infrastructure deficit, limited skills, poor business regulation systems and low access to finance impede the productivity potential of Burkina Faso's urban areas. The current government of the country needs to address these shortfalls while curbing unplanned informal sector development to reduce flood risks in urban areas. Burkina Faso, despite its generally arid and semi-arid climate, does experience flooding, particularly during the rainy season.

Chart 5: GDP (MER) and growth in the Current Path, 1990-2043

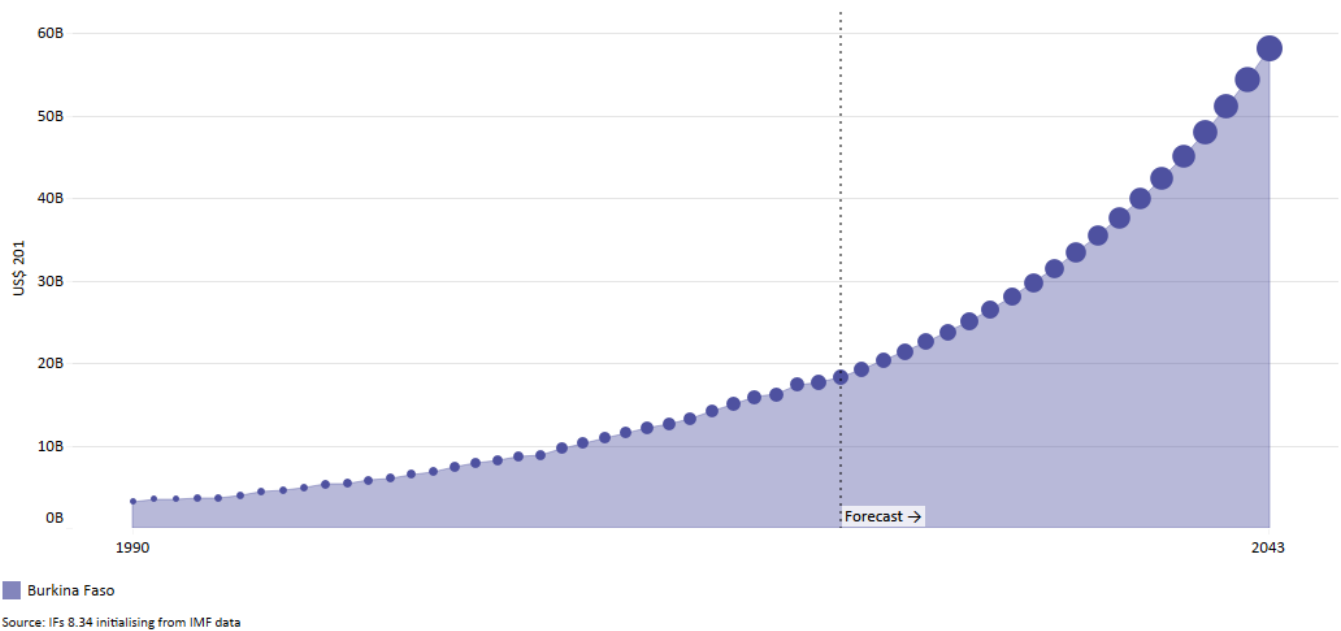


Chart 5 presents GDP in market exchange rates (MER) and growth rate in the Current Path, from 1990 to 2043.

Burkina Faso has limited natural resources. Its economy relies on agriculture and mining, particularly gold production. The agriculture sector entails primarily cotton cultivation, despite its low productivity and dependence on government subsidies, challenging climatic conditions, and an underdeveloped agro-industry.

Burkina Faso's economy is hindered by its **faulty** infrastructure, including limited electrical infrastructure, and vulnerability to the volatility of oil import prices as well as international commodity prices for gold and cotton. The structural challenges of the economy are the over-reliance on agriculture and mining, limited access to financial services, and low levels of human capital development.

Over the previous decade, Burkina Faso experienced relatively rapid economic growth, averaging 6% per annum between 2010 and 2019, driven by gold and cotton production. However, this growth trajectory was disrupted by the COVID-19 pandemic, followed by political and security challenges, with negative impact on growth.

After a slowdown in 2022 (+1.7%), economic growth bounced back to 3.6% in 2023, largely driven by the agriculture and services sectors. Cotton production, which had been affected by insect infestations in 2022, played a key role in revitalising agriculture. The resurgence of gold production, which accounted for 78% of exports in 2021, along with the reopening of previously closed mines due to security concerns and the government's renewal and issuance of new operating licenses, holds the potential to drive growth.

Regarding public finances, the country began fiscal consolidation in 2023, reducing the budget deficit to 6.5% of GDP. This consolidation was largely driven by expenditure cuts, primarily through reduced capital investment and subsidies, aided by lower international oil prices. However, military and humanitarian spending remained elevated. As bilateral donor grants decreased, efforts were intensified to sustain domestic revenue mobilisation. Despite these efforts, the fiscal deficit remained high, with public debt surpassing 60% of GDP in 2023.

Between 1990 and 2023, Burkina Faso's GDP increased almost sixfold from US\$3.2 billion in 1990 to US\$18.3 billion in

2023. It will reach US\$26.5 in 2030 and US\$58 billion in 2043. In the Current Path, the average annual growth rate between 2023 and 2043 is expected to be about 5.8%. However, this optimistic economic growth forecast is contingent upon persistently high levels of political and security instability, climatic shocks, terms of trade shocks, and the full withdrawal from ECOWAS, which could lead to a significant increase in supply costs due to the reintroduction of customs barriers, particularly with Ghana. Going forward, Burkina Faso will have to modernise its public affairs management, readjust public finances, reform the financial system, and improve the business climate to attract the needed investment for development.

Chart 6: Size of the informal economy in the Current Path, 2020-2043

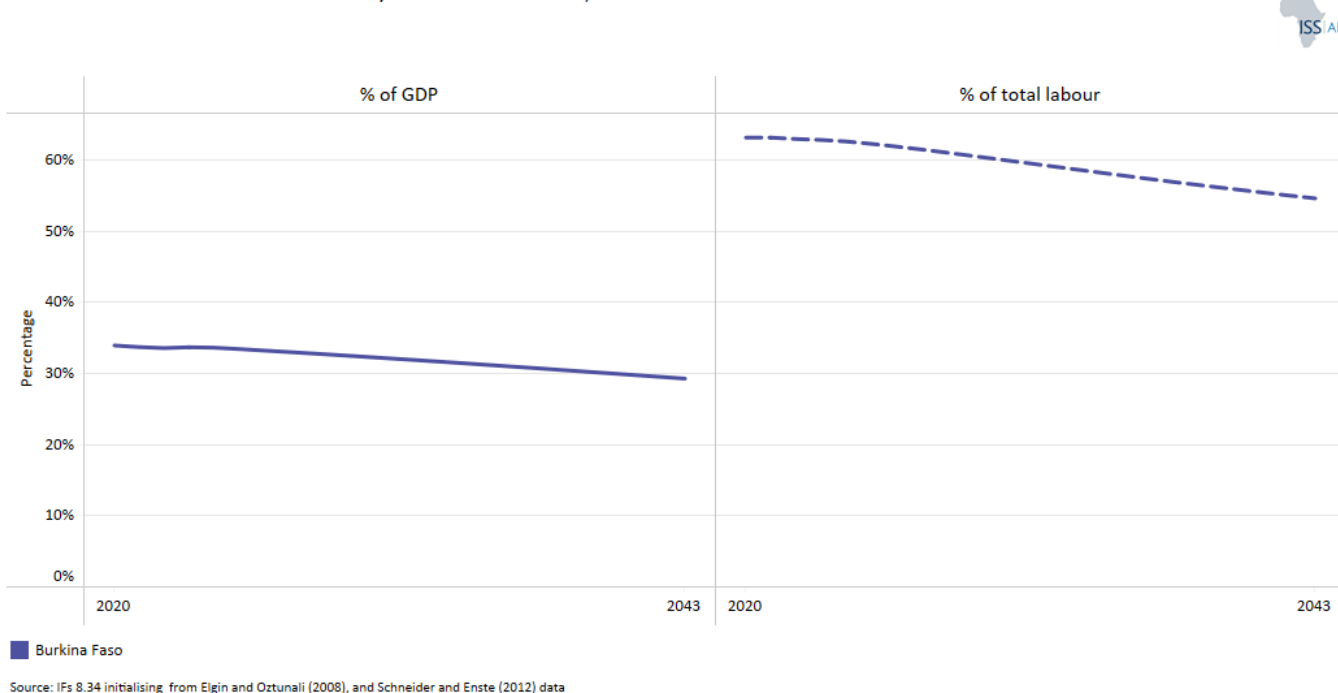


Chart 6 presents the size of the informal economy as per cent of GDP and per cent of total labour (non-agriculture), from 2019 to 2043. The data in our modelling are largely estimates and therefore may differ from other sources.

An informal economy (informal sector or shadow economy) is the part of any economy that is neither officially taxed nor monitored. Countries with high informality have a whole host of development challenges such as low revenue mobilisation, and economic growth tends to be **below potential**

Informality in poorer countries arises not only from burdensome regulations or weak enforcement but also as a consequence of **underdevelopment**. In wealthier countries, where advanced production technologies and favourable economic conditions prevail, workers prefer formal wage employment because of higher wages. Similarly, managers are more likely to register and operate formal businesses, as the greater income potential in developed markets makes formality more profitable, even with the associated costs of taxes and regulations. As countries advance economically, the size of the informal sector typically shrinks. A World Bank **study** found that about 30% of the increase in aggregate output driven by higher productivity is linked to a roughly 25% reduction in the average size of informal enterprises.

With limited formal sector opportunities, most of Burkina Faso's workforce is employed in the low-value-add informal sector. The size of the country's informal economy was estimated at 33.6% of GDP in 2023, above the average of 29.3% for low-income Africa. On the Current Path, the size of the informal sector will decline to 32.3% of GDP in 2030 and 29.3% by 2043. However, this figure will still remain above the forecast of 27% for low-income African countries in 2043.

Chart 7: GDP per capita in Current Path, 1990-2043

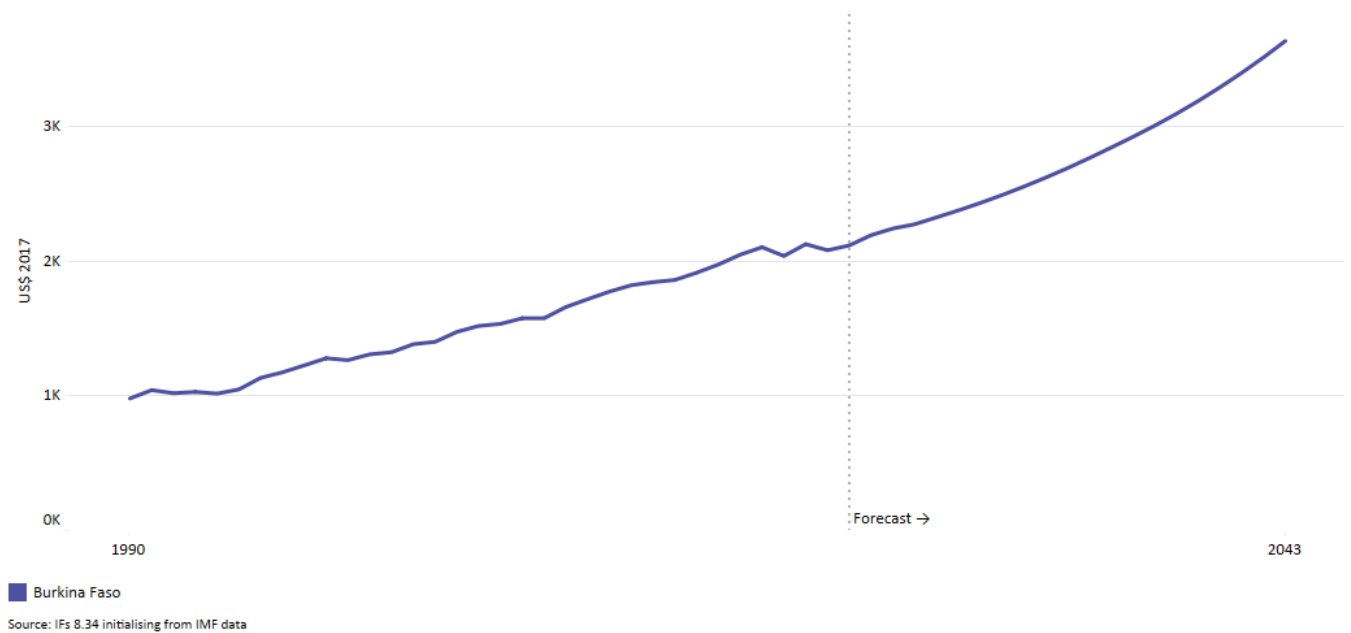


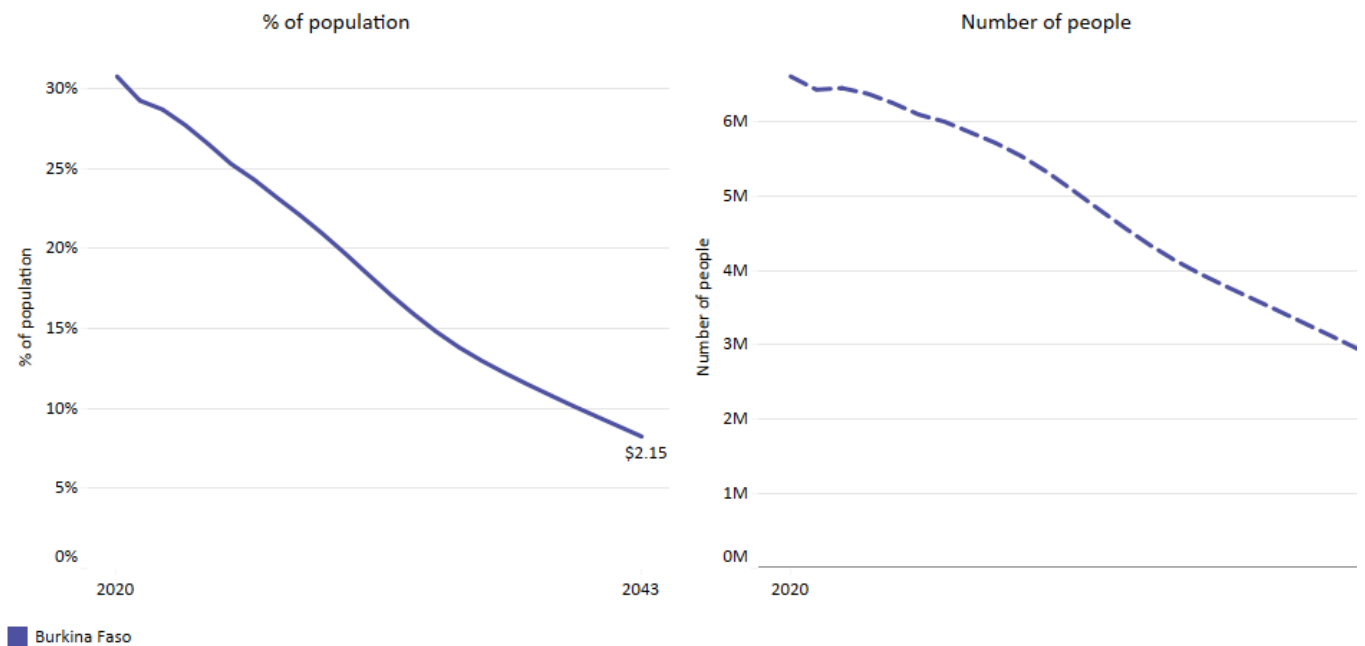
Chart 7 presents GDP per capita in the Current Path, from 1990 to 2043.

Despite being one of the least developed countries in the world, Burkina Faso's GDP per capita has almost doubled from 2000 and 2023 due to strong economic growth and decline in fertility rate. This helped the country reduce the large income gap with its peers. Since 2000, Burkina Faso's GDP per capita has been above the average for low-income Africa. For the preceding 40 years it was below the average.

The GDP per capita (PPP, and constant 2017 US\$) increased from US\$1 266 in 2000 to US\$2 119 in 2023, compared to the average of US\$1 814 for low-income Africa in 2023.

In the Current Path, the country will reach a GDP per capita of US\$2 493 in 2030 and US\$3 638 by 2043, above the projected average of US\$2 984 for low income Africa in the same year.

Chart 8: Extreme poverty in Current Path, 2020-2043



Source: IFs 8.34 initialising from UNPD population prospects estimate, WDI and PovcalNet data

Chart 8 presents the rate and numbers of extremely poor people in the Current Path from 2019 to 2043.

In 2022, the World Bank updated the monetary poverty lines to 2017 constant dollar values as follows:

- The previous International/PPP \$1.90 extreme poverty line is now set at US\$2.15, also for use with low-income countries.
- US\$3.20 for lower-middle-income countries, now US\$3.65 in 2017 values.
- US\$5.50 for upper-middle-income countries, now US\$6.85 in 2017 values.
- US\$22.70 for high-income countries. The Bank has not yet announced the new poverty line in 2017 US\$prices for high-income countries.

Since gaining independence in 1960, Burkina Faso has pursued economic growth as a strategy to reduce poverty and inequality. Over the years, poverty reduction efforts have evolved through four distinct periods of policy development.

From 1990 to 1999, the focus was on implementing five-year development plans and **structural adjustment policies**, along with other initiatives aimed at fostering growth. The period from 2000 to 2010 marked a renewed emphasis on planning, highlighted by the introduction of the Strategic Framework for Poverty Reduction. This framework prioritised equity, improved access to basic social services for the poor, social advancement, and the creation of job opportunities.

The period from 2011 to 2015 focused on developing strategies to accelerate economic growth and promote sustainable development. This was followed by the implementation of the Economic and Social Development Plan (PNDES-I) (2016–2020). Currently, Burkina Faso is executing the Economic and Social Development Plan for 2021–2025 (PNDES-II).

These policies have contributed to poverty reduction (at least as measured using the monetary poverty line) even though a

significant portion of the population still lives in extreme poverty. Indeed, the poverty rate measured at the international extreme poverty line of US\$2.15/day per person declined from 83% in 1990 to about 30.7% in 2019 (i.e. before the COVID-19 pandemic). In 2023, the poverty rate was estimated at about 27.7% (6.4 million people). This is 13 percentage points lower than the average of 41.5% for African low-income countries. Extreme poverty in Burkina Faso is primarily concentrated in **rural areas**, highlighting significant regional disparities, and the need to better target economic and social policy measures toward rural areas and regions for a greater impact on improving the well-being of the population.

In the Current Path, Burkina Faso's poverty rate will steadily decline to reach 19.6% in 2030, and about 7.9% (2.8 million people) in 2043 compared with the projected average of 24.1% for low-income Africa in the same year.

However, monetary poverty only tells part of the story. The global Multidimensional Poverty Index (MPI) measures acute multidimensional poverty by measuring each person's overlapping deprivations across 10 indicators in three equally weighted dimensions: health, education and standard of living.

On the **Multidimensional Poverty Index**, 64.5% of the population in Burkina Faso is multidimensionally poor, about 37 percentage points higher than the monetary poverty rate. An additional 15.8% of the population is also classified as vulnerable to multidimensional poverty. Multidimensional poverty is primarily concentrated in rural areas (79.4%) compared with 25.5% in urban areas.

The binding **constraints** to poverty reduction and shared prosperity in Burkina Faso are weak access to infrastructure, low agricultural productivity, limited access to education and health, increasing insecurity, climate change issues, low inclusion of women in the economy, weak public administration, political instability, and geographical challenges due to being landlocked.

Chart 9: National Development Plan of Burkina Faso

BURKINA FASO

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**Plan national de développement
économique et social 2021-2025 (PNDES-II)**

Juillet 2021

Chart 9 depicts the National Development Plan of Burkina Faso.

In its quest to improve the living conditions of its population, Burkina Faso has developed and implemented several development plans. The most recent ones are its medium term plans, the National Economic and Social Development Plan (PNDES-I) 2016-2020 and the National Economic and Social Development Plan (PNDES-II) 2021-2025. It is unclear whether or not the military government that took power in 2022 will release its own development plan.

The overall objective of the current National Economic and Social Development Plan (PNDES-II) is to restore security and peace, strengthen the nation's resilience, and structurally transform Burkina Faso's economy to achieve strong, inclusive and sustainable growth.

The PNDES-II is built around the following four strategic pillars:

- Pillar 1: Consolidate resilience, security, social cohesion, and peace;
- Pillar 2: Deepen institutional reforms and modernise public administration;
- Pillar 3: Strengthen human capital development and national solidarity;
- Pillar 4: Boost key sectors for the economy and job creation.

The plan aims to strengthen security, prevent conflict, and consolidate peace and social cohesion. In this regard, it seeks to better integrate security into planning and implementation and to increase the involvement of the population in development processes by further promoting tools for endogenous development. Based on this, it aims to enhance the transformation of the economy by leveraging the following:

- Increasing productivity in the agro-sylvo-pastoral, fisheries, and wildlife sectors;
- Developing small and medium-sized manufacturing industries, focusing on the processing of local products;
- Diversifying exports;
- Accelerating the demographic transition to quickly benefit from the demographic dividend.

The expected impacts of the National Economic and Social Development Plan (PNDES-II) 2021-2025 are:

- Strengthening peace, security, social cohesion, and the country's resilience.
- Consolidating democracy and improving the efficiency of political, administrative, economic, financial, local, and environmental governance.
- Raising the level of education and training to better align with economic needs, while increasing the enrolment in technical and vocational training by an average of 8% per year.
- Creating an average of 50 000 decent jobs per year for young people and women.

- Modernising, diversifying, and energising the production system, generating an average annual GDP growth rate of 7.1%.

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Kouassi Yeboua and Enoch Randy Aikins (2025) Burkina Faso. Published online at futures.issafrica.org. Retrieved from <https://futures.issafrica.org/geographic/countries/burkina-faso/> [Online Resource] Updated 21 February 2025.

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