

Burkina Faso

Burkina Faso: Scenarios

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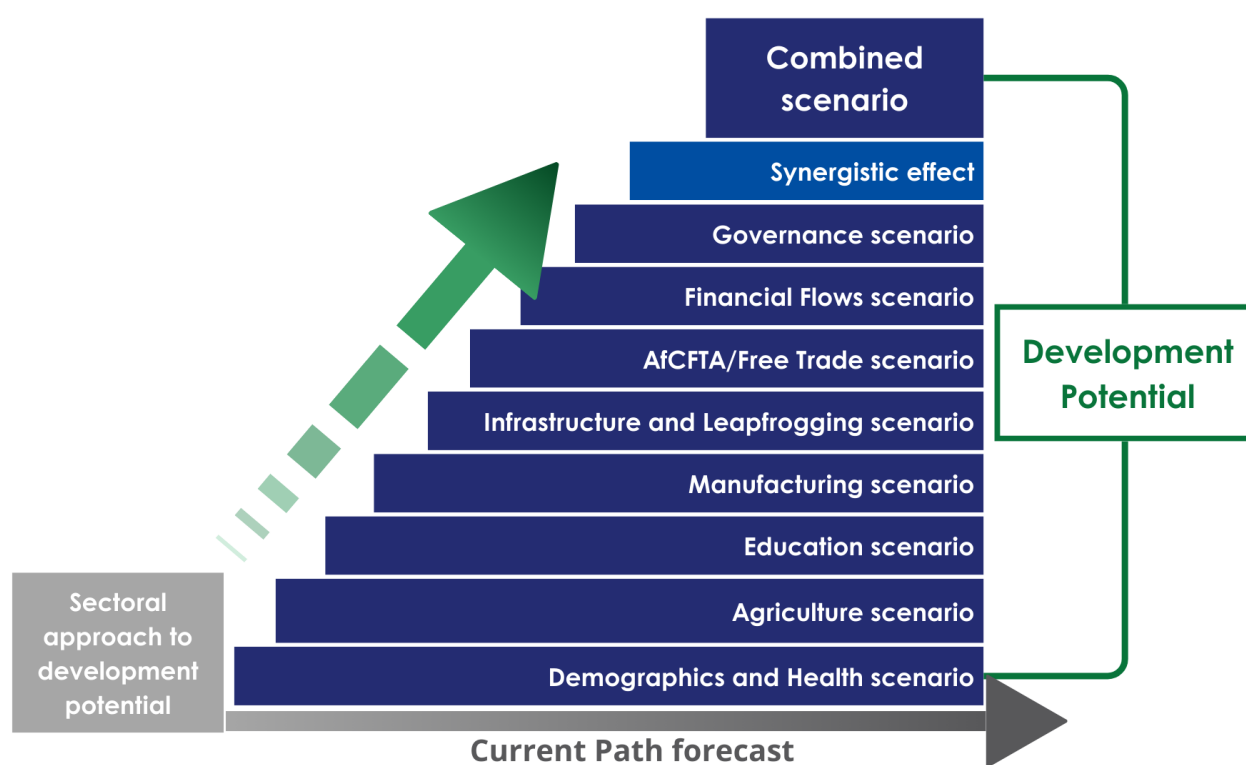
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Burkina Faso: Scenarios

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Briefly

Chart 10: Relationship between Current Path and scenarios



The eight sectoral scenarios as well as their relationship to the Current Path and the Combined scenario are explained in the [About Page](#). Chart 10 summarises the approach.

Demographics and Health scenario

Chart 11: Mortality distribution in the Current Path, 2023-2043

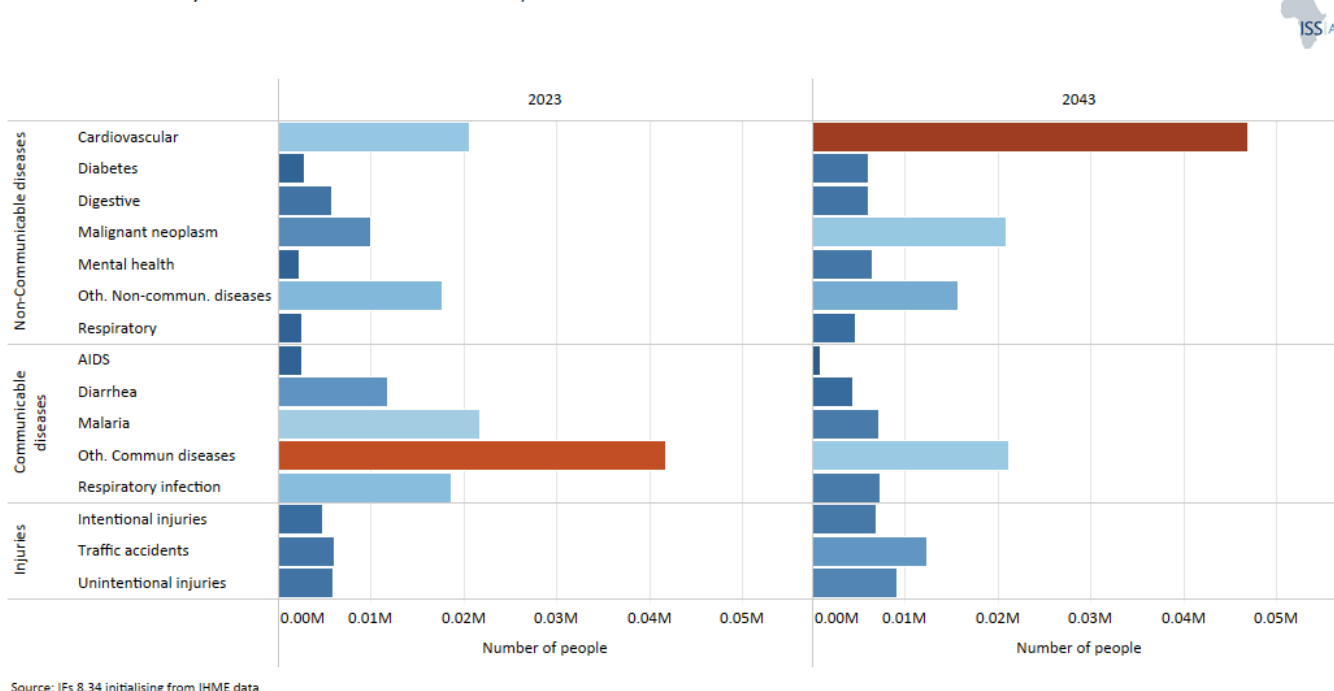


Chart 11 presents the mortality distribution in the Current Path for 2023 and 2043.

There are strong interactions between population size and health. The status of a country's health influences levels of fertility, mortality and morbidity. At the same time, high population growth contributes to an increased need for basic necessities for life, such as nutrition and health.

Burkina Faso made progress in healthcare delivery through the construction and equipping of healthcare facilities, the provision of healthcare personnel to these facilities, and the reduction of maternal and child healthcare costs through the introduction of free care for certain services. Yet, the health system in Burkina Faso is generally poor and continues to face **persistent** challenges. These include (i) weak disease prevention mechanisms; (ii) limited physical and financial access to healthcare centers for a large portion of the population; (iii) insufficient numbers and quality of healthcare personnel and their uneven geographic distribution; (iv) shortcomings in the management of free healthcare for pregnant women and children under five; (v) persistently high levels of maternal, neonatal and infant mortality; (vi) high in-hospital mortality rates; and (vii) malnutrition and micronutrient deficiencies among children.

Communicable diseases remain the leading cause of illness and death in Burkina Faso, with malaria being a major contributor. In 2020, the country recorded an estimated 8.1 million malaria cases and about 20 000 related deaths, making it the top cause of mortality among children under five. According to the **Ministry of Health**, malaria accounts for 43% of healthcare consultations and 22% of deaths.

Limited access to safe drinking water and improved sanitation and lack of hygiene kill and sicken many people, especially children, in the country. As of 2023, only 30% of the population has access to piped water while 24% of the population has access to improved sanitation. On the Current Path, 35% of the population will likely have access to improved sanitation by 2030 while 82.9% will have access to improved water, below the Sustainable Development Goal (SDG) target of 98% in the same year.

Non-communicable diseases such as cardiovascular and malignant neoplasm remain the leading causes of death among the elderly.

However, Burkina Faso has also made some progress in improving key health outcomes in recent years. The stunting rate among children under the age of five has significantly declined from 34.7% in 2010 to 22% in 2023, about 13 percentage points below the average of 34.7% for low-income Africa. Burkina Faso has already achieved the SDG target of 25% by 2030. On the Current Path, the stunting rate among children below five will decline to 18.3% by 2030 and 12.3% by 2043.

Maternal mortality has declined from 727 deaths per 100 000 live births in 1990 to 232 in 2023 compared with an average of 383 for low-income Africa.

Child (under five) mortality has also declined from 198 deaths per 1 000 live births in 1990 to about 100 deaths in 2023, while life expectancy has increased from 50.7 years to 64.3 years over the same period.

Despite this progress, Burkina Faso is not on track to meet the SDG targets related to infant and maternal mortality. On the Current Path, the maternal mortality rate will likely decline to 169 deaths per 100 000 live births by 2030, significantly above the SDG targets of less than 70 per 100 000 live births. This target will probably only be reached in 2043.

Infant mortality (under five) will also decline to 69 deaths per 1 000 live births by 2030 and 39 deaths by 2043, a far cry from the SDG target of 25 deaths per 1 000 live births in 2030.

The Government and development partners should strengthen their support for improving the health system. In this regard, USAID's health initiatives across Burkina Faso aim to improve the country's healthcare system. In collaboration with the Government of Burkina Faso, USAID focuses on reducing malaria-related morbidity and mortality, particularly among children under five and pregnant women.

However, as Western countries and international institutions often condition aid on political stability and democratic governance, the resumption of such aid is unlikely without meaningful political reforms or assurances of stability. In 2023, USAID's Bureau for Humanitarian Assistance (USAID/BHA) provided approximately US\$111 million in funding to Burkina Faso, down from **US\$121 million** in 2022. It remains unclear whether this decrease is linked to the coup.

Without foreign aid, health outcomes in Burkina Faso could significantly deteriorate unless the government enhances its capacity to mobilise domestic resources and manage priorities.

The Demographics and Health scenario therefore envisions ambitious improvements in child and maternal mortality rates, enhanced access to modern contraception, and decreased mortality from communicable diseases (e.g., AIDS, diarrhoea, malaria, respiratory infections) and non-communicable diseases (e.g., diabetes), alongside advancements in safe water access and sanitation. This scenario assumes a swift demographic transition supported by heightened investments in health and water, sanitation, and hygiene (WaSH) infrastructure.

Visit the themes on [Demographics and Health/WaSH](#) for more detail on the scenario structure and interventions.

Chart 12: Infant mortality rate in the Current Path and Demographics and Health scenario, 2020-2043

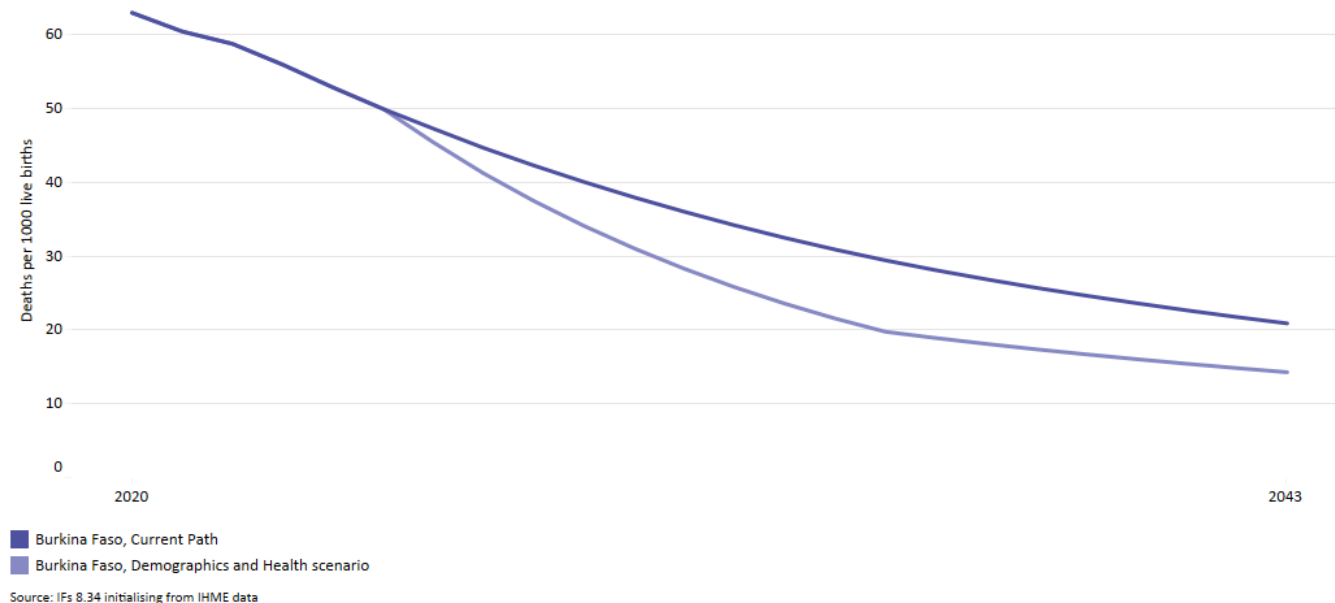


Chart 12 presents the infant mortality rate in the Current Path and in the Demographics and Health scenario, from 2019 to 2043.

The infant mortality rate is the probability of a child born in a specific year dying before reaching the age of one. It measures the child-born survival rate and reflects the social, economic and environmental conditions in which children live, including their health care. It is measured as the number of infant deaths per 1 000 live births and is an important marker of the overall quality of the health system in a country.

Infant mortality has declined from 109 deaths per 1 000 live births in 1990 to 56 deaths in 2023. On the Current Path, infant mortality will continue to decline to about 38 deaths per 1 000 live births by 2030 (above the SDG target of 25), and 21 deaths per 1 000 live births by 2043.

The interventions in the Demographics and Health scenario will see Burkina Faso's infant mortality rate drop to 31 deaths per 1 000 live births by 2030 and 14 deaths per 1 000 live births in 2043, below the projected average of 24 deaths for low-income Africa in 2043.

Chart 13: Demographic dividend in the Current Path and the Demographics and Health scenario, 2020-2043

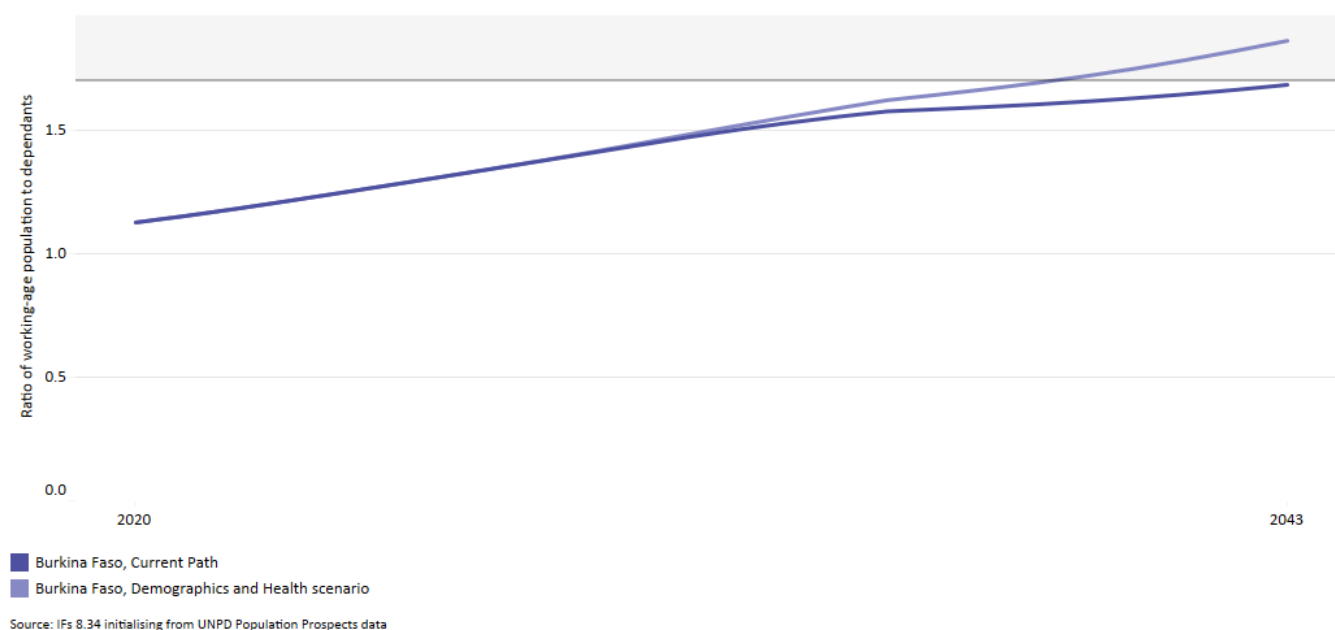


Chart 13 presents the demographic dividend in the Current Path and in the Demographics and Health scenario, from 2019 to 2043.

The demographic dividend is the economic growth generated by change in a country's demographic structure. A potential demographic window of opportunity opens when the ratio of working-age persons to dependents (children and elderly) increases to at least 1.7 to one. However, this is not straightforward, the labour force need to be properly skilled and productively integrated into the economy.

The implementation of the Demographics and Health scenario will accelerate the demographic transition in Burkina Faso. In this scenario, the ratio of the working-age population to dependents will reach the 1.7 threshold by 2038. On the Current Path, this minimum ratio will only be achieved in 2044. The materialisation of the demographic dividend (growth generated by change in a country's population structure) is not straightforward; the growing labour force needs to be properly skilled and productively integrated into the economy.

Agriculture scenario

Chart 14: Crop production and demand in the Current Path, 1990-2043

Area chart show demand less production

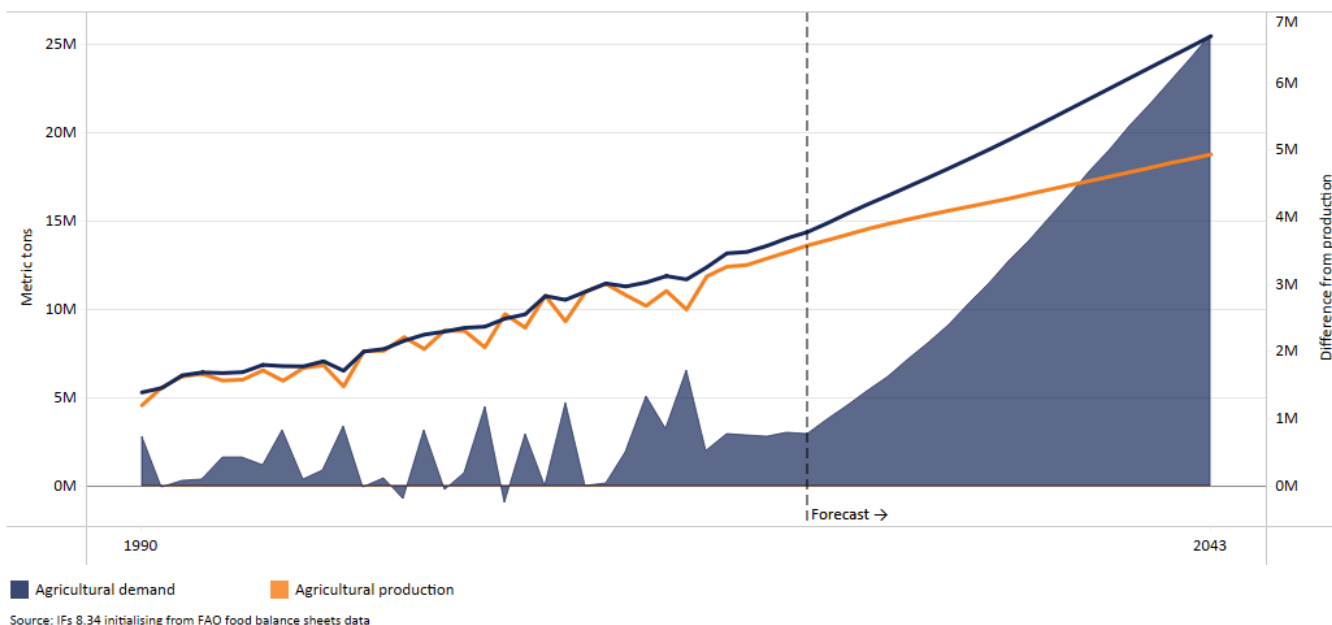


Chart 14 presents crop production and demand in the Current Path from 1990 to 2043.

Agriculture plays a crucial role in Burkina Faso's economy and the livelihoods of its people. Although its contribution to the national economy has declined over time, it still accounts for about a quarter of the country's GDP, and employs **71%** of the nation's poor.

The sector is primarily made up of small-scale farms, each typically less than **five hectares** in size, producing key crops like sorghum, millet and maize (the highest in volume) as well as cotton (the most valuable). Before the rise of gold mining, cotton was the country's leading export, and Burkina Faso is a top cotton producer and exporter in Africa. Traditional **cereals**, such as sorghum and millet, form the dietary staples of rural households, while urban residents favour rice and maize.

Agricultural production in Burkina Faso is generally characterised by low yields in both crops and livestock, mainly sustaining subsistence-level livelihoods. Although progress in the agricultural sector has reduced the threat of recurring famine, food insecurity remains a serious issue, affecting over **3.5 million** people—about 20% of the population. In 2023, about 13% of the population was malnourished. On the current trajectory, the share of malnourished population will decrease to 12% by 2030 (still above the SDG target of 3%) and to 8.8% by 2043.

Despite being one of the few African countries to meet the Comprehensive Africa Agriculture Development Programme (CAADP) target of allocating at least 10% of the national budget to agriculture, Burkina Faso has one of the lowest average crop yields per hectare on the continent. In 2023, the country's yield was estimated at 2.2 tons per hectare, ranking it 40th out of 54 African nations. While this represents a 57% increase from 1.4 tons per hectare in 1990, it remains low. Burkina Faso's crop yields will rise only slightly to 2.3 and 2.6 tons per hectare in 2030 and 2043, respectively, still falling short of the 3.5 tons per hectare average projected for low-income African countries in 2043.

The country's low agricultural productivity is driven by several **challenges**, including limited access to quality inputs and services, high costs of inputs and equipment, insecure land tenure, lack of access to profitable markets, insufficient financial services, limited producer knowledge and capacity, poor transportation infrastructure, and inadequate irrigation systems. These challenges are compounded by the effects of climate change and growing insecurity, which further threaten an already vulnerable agricultural sector.

Going forward, feeding the growing population under such conditions will be one of the country's biggest challenges. In 2023, an estimated 13.2 million metric tons of crops were produced, a significant increase from the 5.3 million metric tons produced in 1990. On the Current Path, crop production will increase to about 15.6 million and 18.8 million metric tons by 2030 and 2043, respectively, while crop demand is set to increase from 14.4 million metric tons in 2023 to about 18 million and 25.5 million metric tons by 2030 and 2043, respectively. This leads to a deficit of 8 million metric tons in 2043. The Current Path paints a picture of a growing gap between domestic food production and demand, a situation that will exacerbate the country's agricultural trade deficit with agricultural import dependency of 17.3% of total demand in 2030 and 27.7% of total demand by 2043 compared to 6.5% in 2023.

The Agriculture scenario envisions an agricultural revolution that ensures food security through ambitious yet feasible increases in yields per hectare, thanks to improved management, seed, fertiliser technology, and expanded irrigation and equipped land. Efforts to reduce food loss and waste are emphasised, with increased calorie consumption as an indicator of self-sufficiency and prioritising it over food exports. Additionally, the scenario includes enhanced forest protection signifying a commitment to sustainable land use practices.

Visit the theme on [Agriculture](#) for our conceptualisation and details on the scenario structure and interventions

Chart 15: Import dependence in the Current Path and Agriculture scenario, 2020-2043

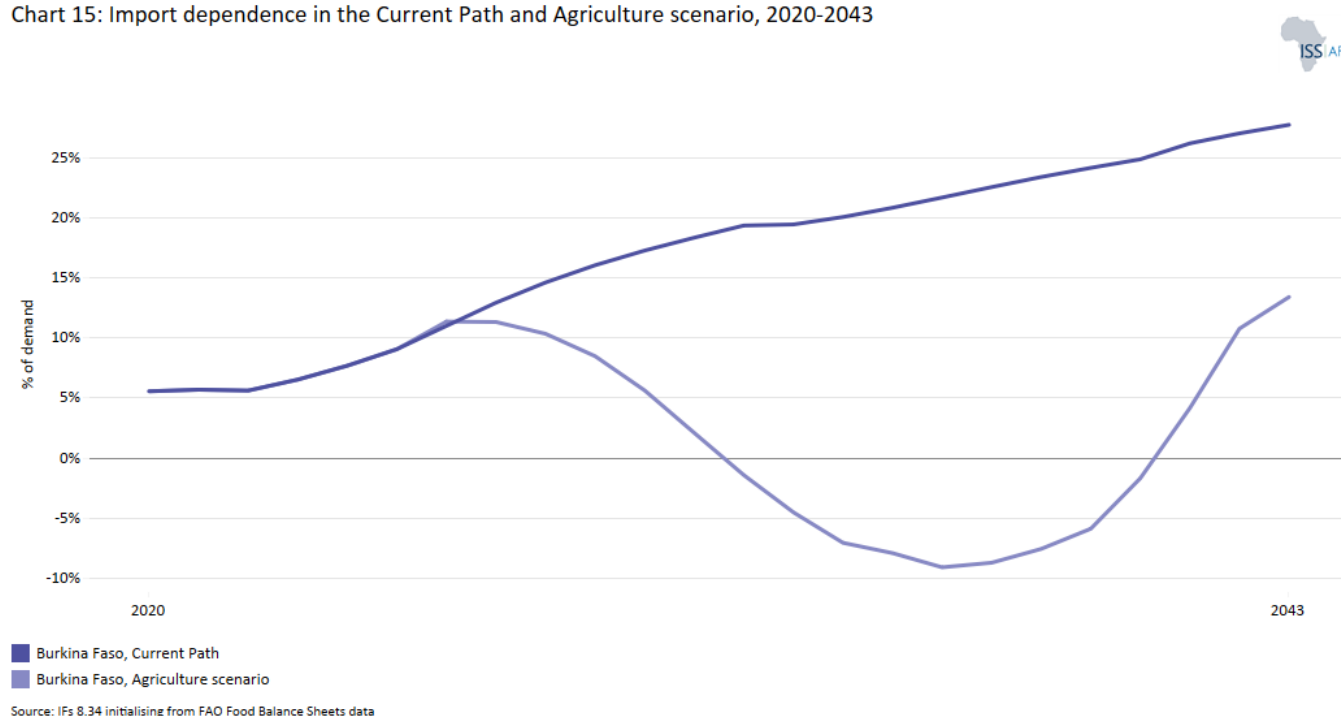


Chart 15 presents the import dependence in the Current Path and the Agriculture scenario, from 2019 to 2043.

The Agriculture scenario will benefit Burkina Faso by increasing yields, reducing vulnerable rain-fed crops through irrigation schemes, reducing post-harvest losses and tapping into the country's agricultural potential. In the Agriculture scenario, average crop yields could increase to 4.1 metric tons per hectare in 2043 compared with 2.6 tons on the Current

Path in the same year. As a result, crop production will be 8.2 million metric tons more by 2043 than in the Current Path. This will result in a lower import dependency of 5.6% and 13% of total demand in 2030 and 2043, respectively, compared with 27.7% in the Current Path and below the average of 34% for low-income Africa in 2043.

Education scenario

Chart 16: Progress through education funnel in the Current Path, 2023-2043

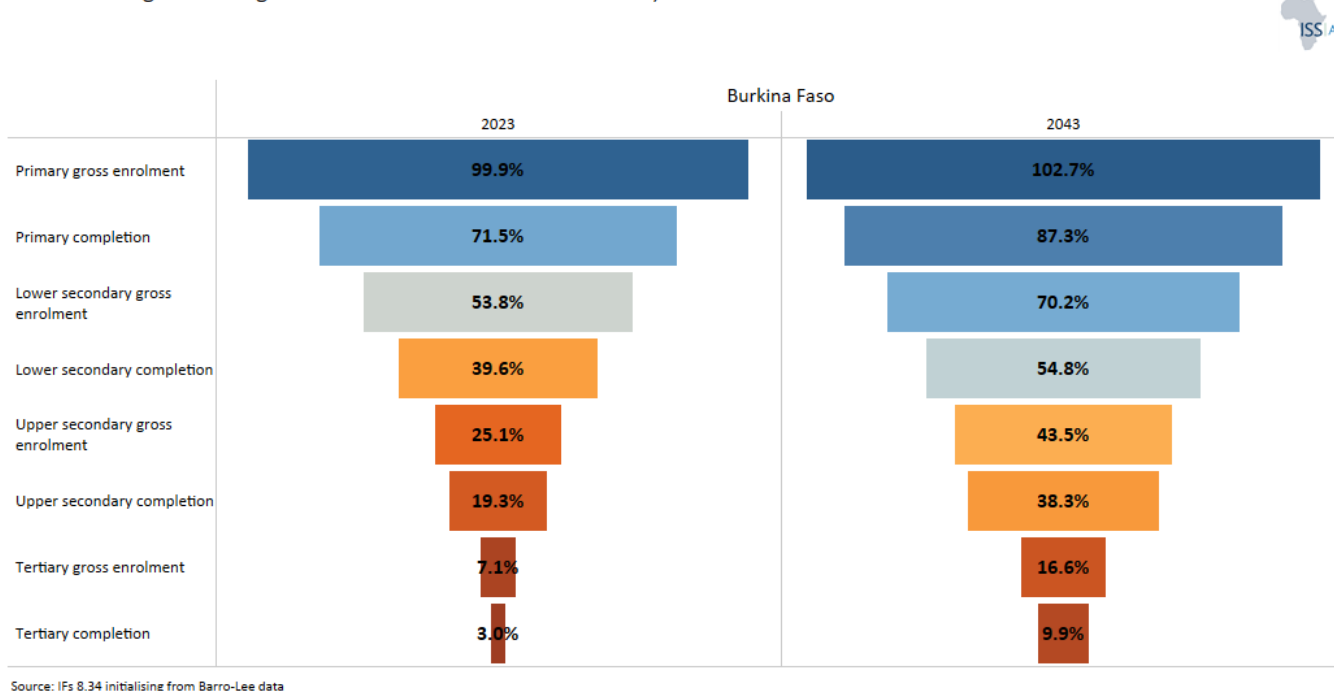


Chart 16 depicts the progress through the educational system in the Current Path, for 2023 and 2043.

The Burkinabé educational system is structured into primary, secondary and higher education. It is generalist in nature, and does not meet the needs of the job market. Despite various reforms, basic education is declining in quality, and technical and vocational education and training (TVET) is weak both in terms of quality and quantity, as well as disorganised, with pronounced regional and gender **disparities** and struggles with access, quality and retention at all levels.

Burkina Faso has one of the lowest literacy rates in Africa. In 2023, the adult literacy rate (population aged 15 years and older) was estimated at 43.6%; the country ranks 47 of 54 countries in Africa. A higher literacy rate is important to improve employment prospects for the poor, and hence, an opportunity to escape from extreme poverty. On the Current Path, the literacy rate in Burkina Faso will likely increase to 54.7% in 2030 and 80% by 2043.

The country has made progress in primary gross enrolment, which stood at 99.8% in 2023, slightly below the average of 108% for Africa's low-income countries. This high percentage, however, reflects the continued presence of over-aged learners at the primary level as the net primary school enrolment was 97% in 2023, reflecting challenges in getting all school-age children into classrooms.

While enrolment has improved, completion rates remain low even though above the average for low-income Africa (65.9% in 2019, the last year of available data), compared with an average of 54.3% for low-income countries.

On the Current Path, primary school completion rate will be 79.4% by 2030, still below the SDG target of 97%. High dropout **rates**, especially among girls, and disparities between urban and rural areas are major concerns.

Because of low completion and transition rates right from the primary level, fewer students are eligible for subsequent

education levels and the resultant outcomes get poorer (Chart 16), which in turn reduces human capital accumulation.

Enrolment rates drop significantly after primary school, with a sharp decline in both lower- and upper-secondary levels. Many students do not transition from primary to secondary education, and those who do often face overcrowded classrooms and insufficient resources. In 2023, gross lower-secondary school enrolment stood at 53.7% while gross upper-secondary school enrolment was only 25%. On the Current Path, gross lower- and upper-secondary school enrolment will likely reach 60.9% and 31.8% in 2030, and 70% and 43.4% in 2043, respectively.

The lower-secondary education completion rate stood at 39.5% in 2023 while the upper-secondary education completion rate was only 19.3%. On the Current Path, lower- and upper-secondary education completion rates will increase but the country will likely miss the SDG target of 97% in 2030 by a substantial margin. Indeed, lower- and upper-secondary school completion rates will likely reach 44.4% and 26.2% in 2030, and 54.77% and 38.3% in 2043, respectively.

At the tertiary level, universities and other higher education institutions offer undergraduate, graduate and vocational programs. The Université Ouaga I Pr Joseph Ki-Zerbo, located in the capital Ouagadougou, is one of the largest and most prominent institutions in the country. The higher education sector faces issues related to limited capacity, outdated curricula and inadequate infrastructure. The gross tertiary enrolment rate was just 7.1% in 2023, above the average of 8.7% for low income Africa. On the Current Path, it could get to 16.6% in 2043.

While Burkina Faso has made progress in closing the gender gap, significant disparities remain. Girls are less likely than boys to attend school, and the dropout rate for girls is higher, particularly in rural areas. Early marriage, pregnancy and discriminatory social norms contribute to lower education attainment among girls. For instance, the parity ratio at the tertiary level stood at 0.64 in 2023 (1 is full parity). Also, the upper-secondary education gross enrolment rate parity ratio (female/male) is forecast to be 0.85 in 2030 (below the SDG target of 1) and 0.94 in 2043.

Although the country has made some progress in getting more children into school, the quality of education they receive is poor. This remains one of the major challenges facing the education system. Similar to many other African countries, Burkina Faso is facing a learning crisis. Learning poverty, defined as the share of children not able to read and understand an age-appropriate text by age 10, is estimated by the World Bank, UNESCO, and other organisations at 74% in Burkina Faso. It is imperative to improve the quality of the education provided in schools.

Overall, Burkina Faso has made progress in improving access to education, particularly at the primary level, however significant challenges remain in ensuring quality, reducing dropout rates, and expanding access to secondary and higher education. Efforts to address gender disparities, improve infrastructure and enhance teacher training will be critical for the future development of the country's education system.

The Education scenario represents reasonable but ambitious improved intake, transition and graduation rates from primary to tertiary levels, with a particular focus on both lower- and upper-secondary levels and better quality of education. It also models substantive progress towards gender parity at all levels, additional vocational training at the secondary school level and increases in the share of science and engineering graduates.

Visit the theme on [Education](#) for our conceptualisation and details on the scenario structure and interventions.

Chart 17: Mean years of education in the Current Path and Education scenario, 2020-2043

15 to 24 year age group

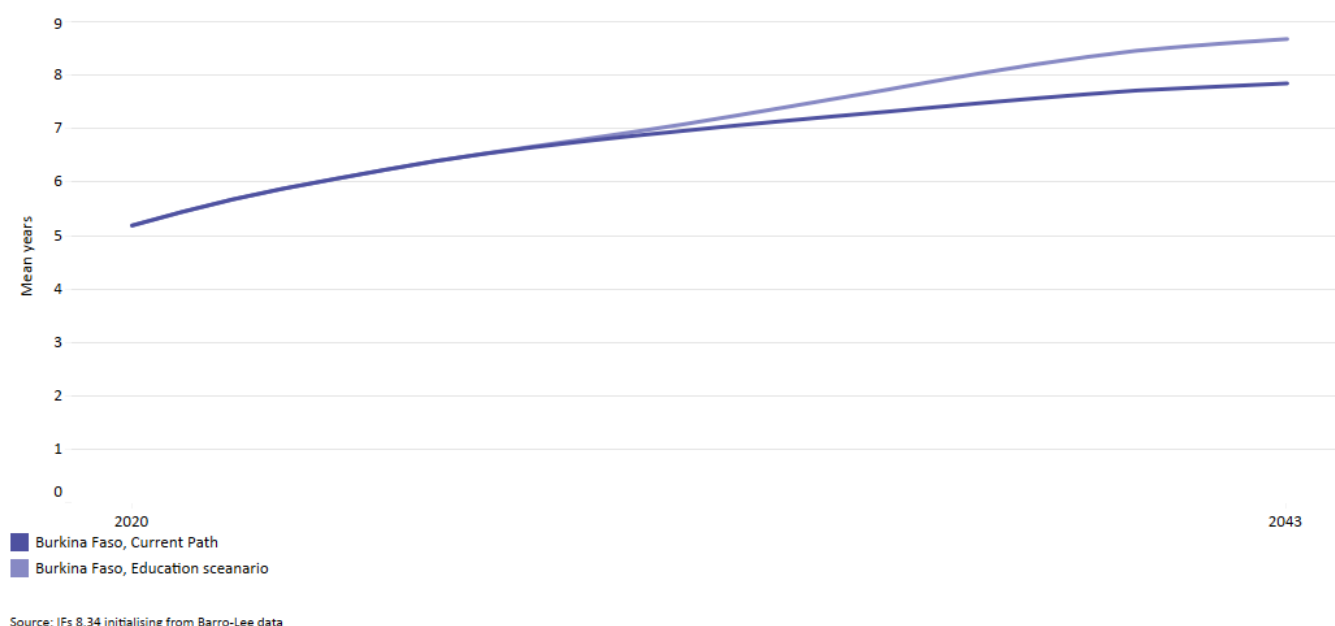


Chart 17 presents the mean years of education in the Current Path and in the Education scenario, from 2019 to 2043, for the 15 to 24 age group.

The average years of education in the adult population aged 15 to 24 is a good first indicator of the stock of human capital in a country but Burkina has one of the lowest in Africa, at 5.8 years in 2023. The country ranked 38th in Africa (out of 54). The implementation of the Education scenario would improve the mean years of education for adults aged 15 to 24 in the country to about 7 years in 2030 and 8.6 years by 2043 compared with 6.8 years in 2030 and 7.8 years in 2043 in the Current Path (Chart 17).

Low-skilled and poorly educated workers make up most of the labour force in Burkina Faso. Due to the low economic complexity, the labour market tends to require more unskilled labour but over time, as the economic complexity increases, there will be a growing demand for more skilled labour, particularly in the formal sector. Given the current weak education system, the country is ill-prepared to produce relevant skills for the job market, which could hamper competitiveness and productivity.

The Education scenario could contribute to addressing these challenges. In this scenario the share of science and engineering students in tertiary graduates in Burkina Faso will increase to 20.4% by 2043, five percentage points higher than the 15.4 % projected on the Current Path in 2043.

While Burkina Faso faces significant educational challenges, particularly in terms of low average years of schooling and a predominance of low-skilled workers, targeted improvements in the education sector could foster substantial progress. By enhancing the quality and relevance of education through increased support for science, engineering and vocational training, the achievement of the outcomes modelled in the Education scenario would equip the country with a more skilled labour force by 2043. Improved education outcomes would also support broader socio-economic growth, enabling the country to take advantage of future opportunities in the regional and global labour markets.

Manufacturing scenario

Chart 18: Value-add by sector as % of GDP in the Current Path, 2020-2043

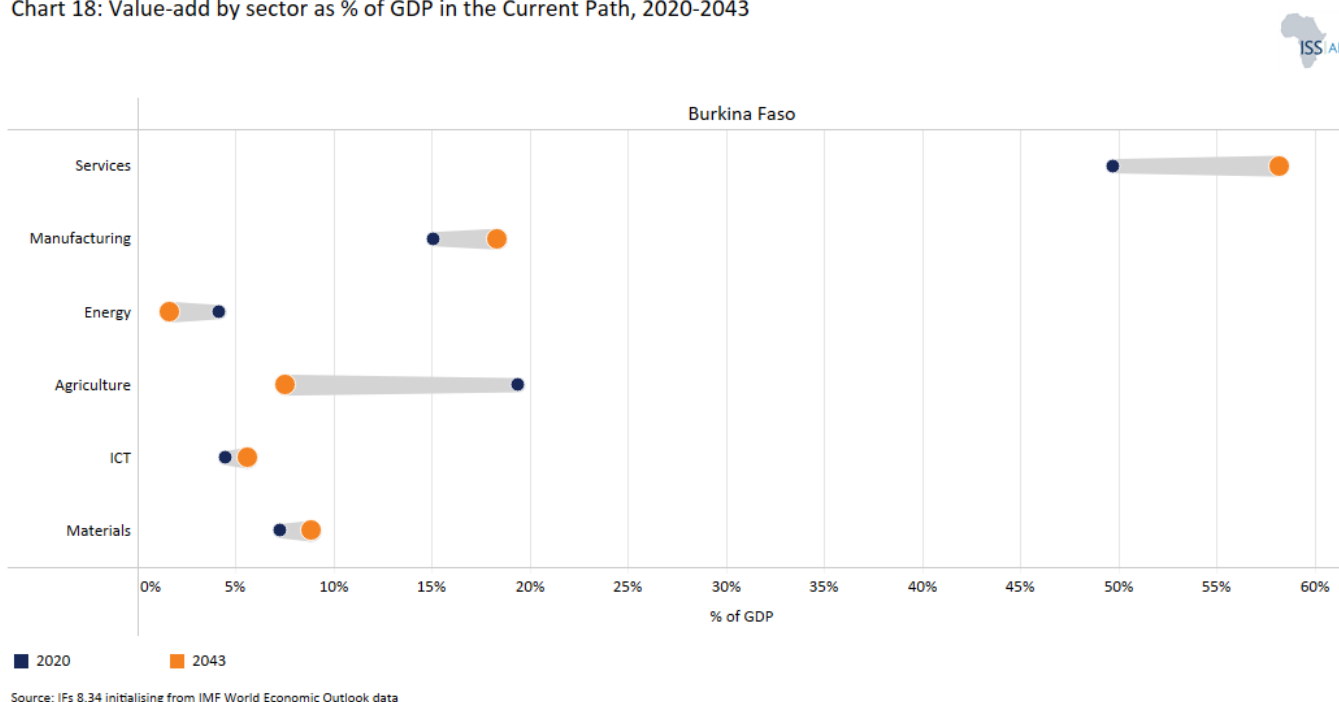


Chart 18 presents the value-add by sector as share of GDP in the Current Path, for 2023 and 2043.

The economy of Burkina Faso depends heavily on agriculture, particularly livestock farming, and the exploitation of mineral resources.

Agro-processing is the most prominent part of Burkina Faso's small manufacturing sector, and it includes the transformation of agricultural products like cotton, grains, fruits and nuts. Cotton processing is particularly important, as Burkina Faso is one of Africa's largest cotton producers. Other agro-processing activities include the production of flour, edible oils, sugar, beverages and dairy products.

The textile industry, linked to the cotton sector, includes activities such as spinning, weaving and garment production. However, the industry has not fully capitalised on Burkina Faso's strong cotton production due to infrastructure and technological constraints.

The production of cement, bricks and other construction materials is an important part of the manufacturing sector. This is largely driven by domestic demand from the construction and infrastructure industries.

Several small and medium-sized enterprises (SMEs) are also involved in the production of packaged foods, drinks (such as beer and soft drinks), and processed food items. This sub-sector is growing as urbanisation and a rising middle class create higher demand for consumer goods.

The country also has a modest pharmaceutical industry that produces medicines for domestic consumption. There are also companies involved in producing soaps, detergents and basic chemical products.

Burkina Faso, like many African nations, has been de-industrialising while still poor (premature de-industrialisation), raising the worrying prospect that it could miss out on the chance to increase incomes by shifting workers from subsistence farming to higher-paying factory jobs.

The contribution of the manufacturing sector to GDP has been declining from its peak of 19% in 1973 to 10% in 2019 and about 9.6% in 2022 (the latest available data), on par with the average of 9.4% for low-income Africa. Burkina Faso is currently one of the least-industrialised countries in Africa. In 2022, it ranked 36 of 52 countries on the African Development Bank's African [Industrialisation Index](#), which measures African progress on industrialisation. On the Current Path, the share of the manufacturing sector in Burkina Faso's GDP will likely be 16% in 2030 and 18% by 2043, above the projected average of 16% for low-income Africa (Chart 18).

The manufacturing sector faces significant challenges. One is the lack of adequate infrastructure, particularly in energy and transportation. Frequent power outages and expensive electricity make manufacturing costs high, limiting competitiveness. Also, small and medium-sized enterprises (SMEs), which form the backbone of the manufacturing sector, often struggle with limited access to affordable financing. Banks in Burkina Faso tend to have high lending rates, and there is limited venture capital for industrial investment.

Manufacturing firms in Burkina Faso generally operate with outdated technologies and lack the advanced machinery needed for efficient production. Additionally, there is a shortage of skilled labour and technical expertise, which hinders productivity and innovation.

Ongoing political instability and security threats from terrorism have also deterred both domestic and foreign investment in the manufacturing sector. Uncertainty reduces long-term planning and investment in industrial projects. In sum, though there have been great strides in improving the regulatory environment for doing business in Burkina Faso, an unskilled and uneducated workforce, poor transportation infrastructure, periodic shortages of water and electricity, high energy costs, a deteriorating security environment, and a weak judicial system are still undermining growth of the [manufacturing sector](#) in Burkina Faso.

Like in other African countries, many impoverished individuals in Burkina Faso find themselves trapped in subsistence agriculture and informal service-based activities. Boosting the manufacturing sector will generate inclusive growth by facilitating the transition of low-income individuals from these sectors to higher-productivity areas. This structural shift not only boosts incomes but fosters a positive cycle wherein the growth of productive employment, capacities and earnings mutually reinforce one another, propelling economic expansion and poverty reduction.

The Manufacturing scenario models the impact of a manufacturing push in Burkina Faso. A reasonable but ambitious growth in manufacturing is envisaged through increased investment in the sector, research and development (R&D), and improved government regulation of businesses. This aims to enhance labour intensive manufacturing to create more jobs, particularly among females.

Visit the theme on [Manufacturing](#) for our conceptualisation and details on the scenario structure and interventions.

Chart 19: Value-add by the manufacturing sector in the Current Path and Manufacturing scenario, 2020-2043

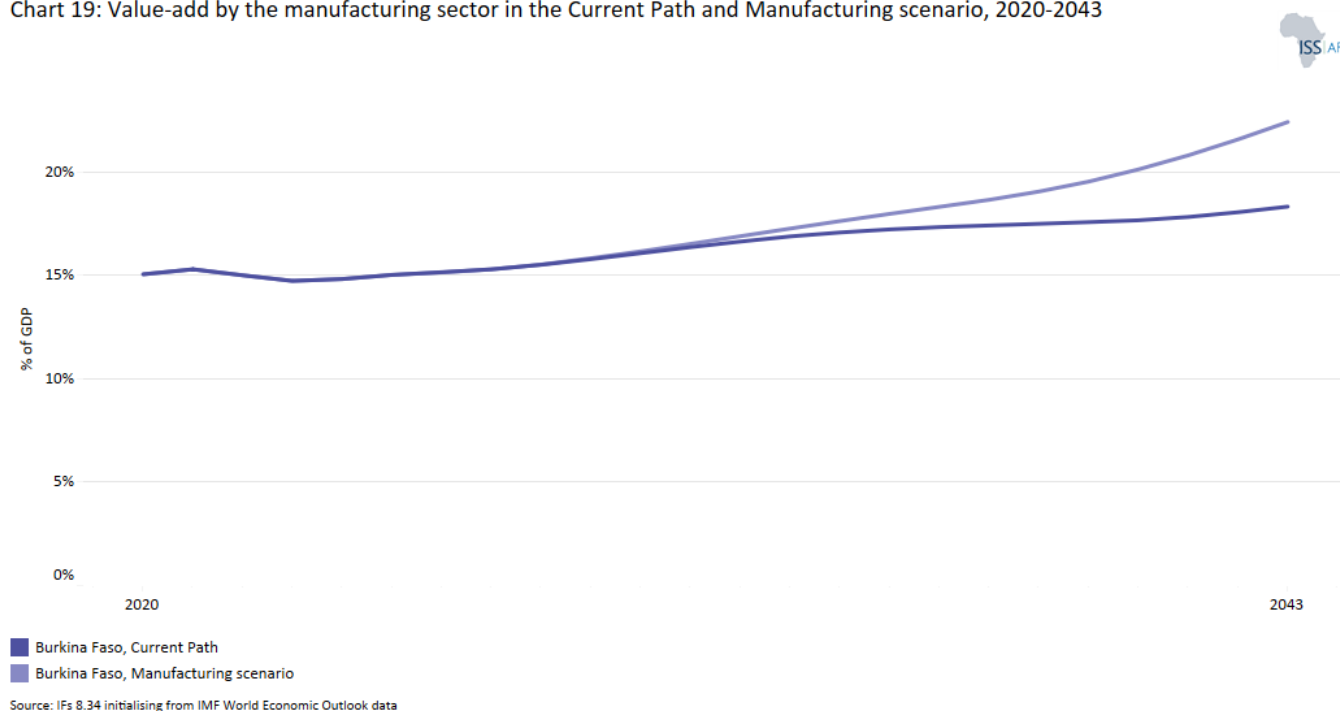


Chart 19 presents the contribution of the manufacturing sector to GDP in the Current Path and in the Manufacturing scenario, from 2019 to 2023. The data is in US\$ and % of GDP.

The manufacturing sector in Burkina Faso is still in its early stages of development, but it holds potential as a driver of economic diversification and job creation. Key areas for growth include agro-processing, textiles and renewable energy integration. Addressing challenges related to infrastructure, finance and skills development will be crucial for unlocking the sector's full potential and making Burkina Faso more competitive in regional and global markets.

On the Current Path, the share of the manufacturing sector in Burkina Faso's GDP will likely increase to 16% in 2030 and 18.3% by 2043, above the projected average of 16.2% for low-income Africa in 2043. The implementation of the Manufacturing scenario could further push the share of the manufacturing sector in GDP to 16.2% in 2030 and 22.4% by 2043 (Chart 19), above the projected average of 16.2% for low-income Africa in 2043.

However, industrialisation is a long-term process. It requires constructive relationships between the state that encourages and supports the private sector. Firms need a state that has strong capabilities in setting an overall economic vision and strategy, efficiently providing supportive infrastructure and services, maintaining a regulatory environment conducive to entrepreneurial activity, and making it easier to acquire skilled labour and new technology and enter new economic activities and markets.

AfCFTA scenario

Chart 20: Export and imports as % of GDP in the Current Path, 2000-2043

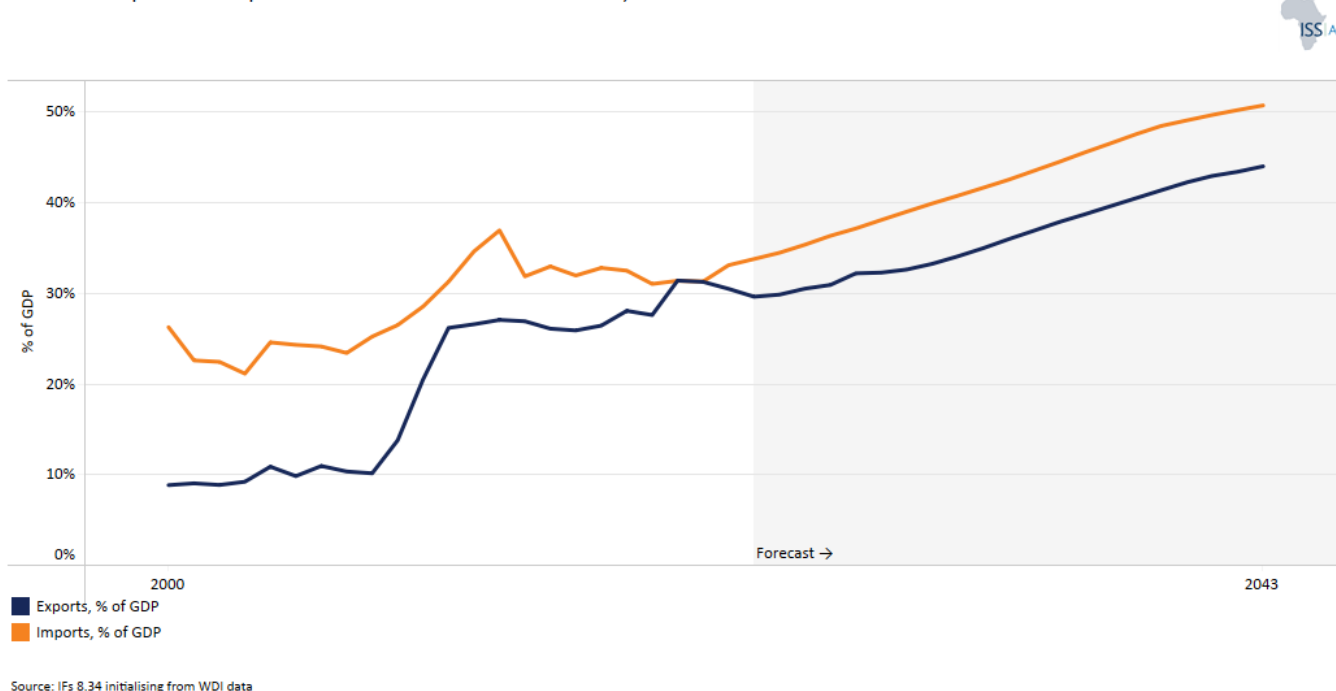


Chart 20 depicts exports and imports as a percentage of GDP, from 2000 to 2043, in the Current Path and in the AfCFTA scenario.

Burkina Faso has an economy largely dependent on cotton and gold exports making it vulnerable to terms-of-trade shocks, which can have an outsized impact on its impoverished population.

The trade pattern of Burkina Faso is similar to that of many other African countries that rely on a few key commodity exports while importing higher-value manufactured goods, consumer items and foodstuffs.

Burkina Faso's **top exports** are gold and raw cotton. In 2022, gold accounted for 82.2% of Burkina Faso's total export value, while raw cotton accounted for 6.12%. Other exports are Oily Seeds (2.06%), Coconuts, Brazil Nuts, Cashews (2.05%) and Zinc Ore (1.97%). The most common destinations for the exports of Burkina Faso are Switzerland (74.2% of total exports in 2022), United Arab Emirates (6.56%), Mali (3.71%), Singapore (2.11%) and Côte d'Ivoire (2.09%). On the Current Path, total export value will be equivalent to 29.5% of GDP in 2030 and 38.8% of GDP by 2043.

Burkina Faso's **top imports** are Refined Petroleum (22.6%), Electricity (3.14%), Packaged Medicaments (3.1%), Petroleum Gas (2.38%) and Cement (2.35%). The most common import partners for Burkina Faso are Côte d'Ivoire (16% of Burkina's total imports), China (11%), Russia (7.41%), France (7.28%) and Ghana (5.41%).

Outside of ECOWAS and the Community of Sahel-Saharan States(CEN-SAD), Burkina Faso has limited trade with other non-member African countries. Intra-Africa trade exports (imports) remain very low at **11% (9%)** which is less than the continental average of 18%.

In 2023, the total import value was estimated at 33.8% of GDP while the total export represented 29.6%, leading to a trade deficit equivalent to 4% of GDP. On the Current Path, the value of imports is expected to continue to remain above

Burkina's exports reaching 39.9% in 2030. By 2043, Burkina's import value will represent 50.7% of GDP against 44% for its exports in the same year (Chart 20).

The AfCFTA scenario models the impact of fully implementing the African Continental Free Trade Agreement by 2034. The scenario increases exports in manufacturing, agriculture, services, ICT, materials and energy exports. It also includes improved multifactor productivity growth from trade and reduced tariffs for all sectors.

Visit the theme on [AfCFTA](#) for our conceptualisation and details on the scenario structure and interventions.

Chart 21: Trade balance in the Current Path and AfCFTA scenario, 2020-2043

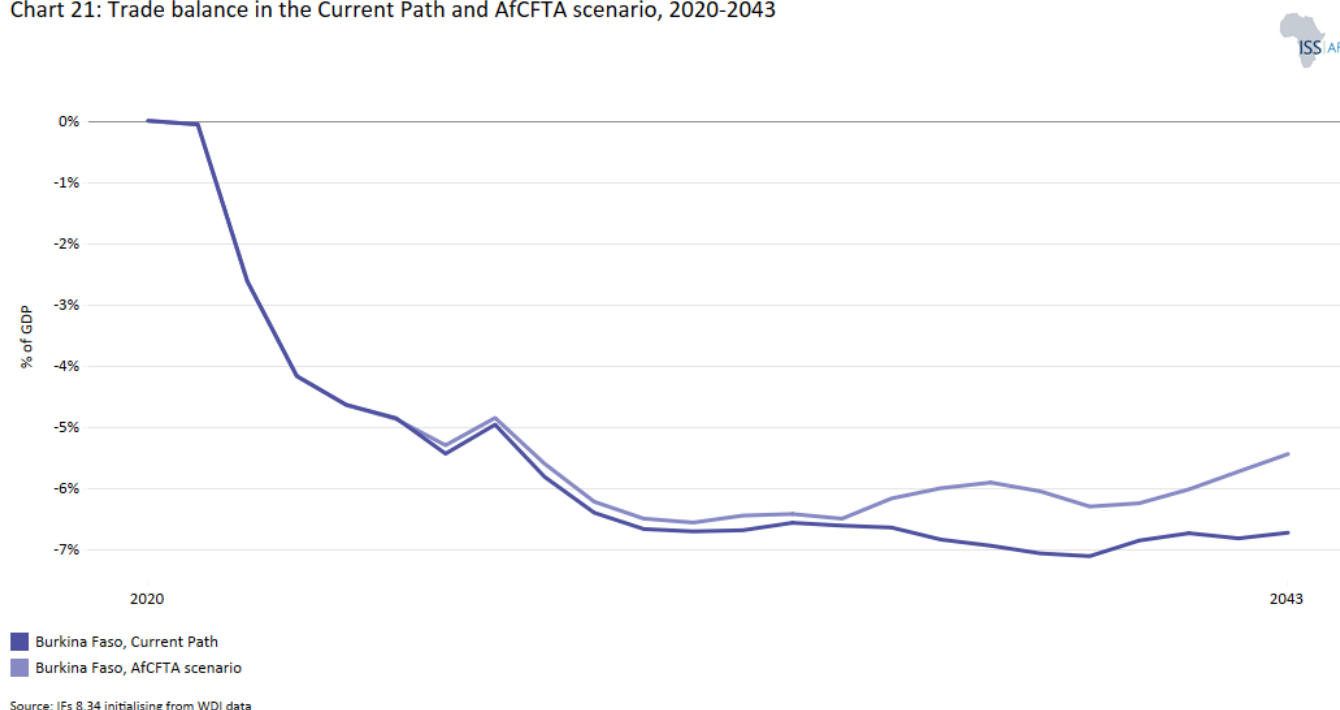


Chart 21 presents the trade balance in the Current Path and in the AfCFTA scenario, from 2019 to 2043 as a percentage of GDP.

Burkina Faso's trade balance is structurally in deficit—a trend which is likely to persist over the forecast horizon. On the Current Path, the trade deficit will worsen reaching 6.6% of GDP in 2030 and 6.7% in 2043.

In the AfCFTA scenario, where trade restrictions are loosened and productivity is increased through competition and technology diffusion, Burkina Faso would not record a trade surplus by becoming a net exporter; however, its trade deficit could improve from a projected deficit equivalent to -6.7% of GDP in the baseline scenario (Current Path) by 2043 to -5.4% of GDP.

The AfCFTA represents a major opportunity for African countries, including Burkina Faso, to overcome the constraints of narrow domestic markets to boost exports. The full implementation of the AfCFTA will also enable the country to avoid high tariffs on its exports to ECOWAS countries if its withdrawal from the regional bloc is finalised.

Large Infrastructure and Leapfrogging scenario

Chart 22: Electricity access: urban, rural and total in the Current Path, 2000-2043

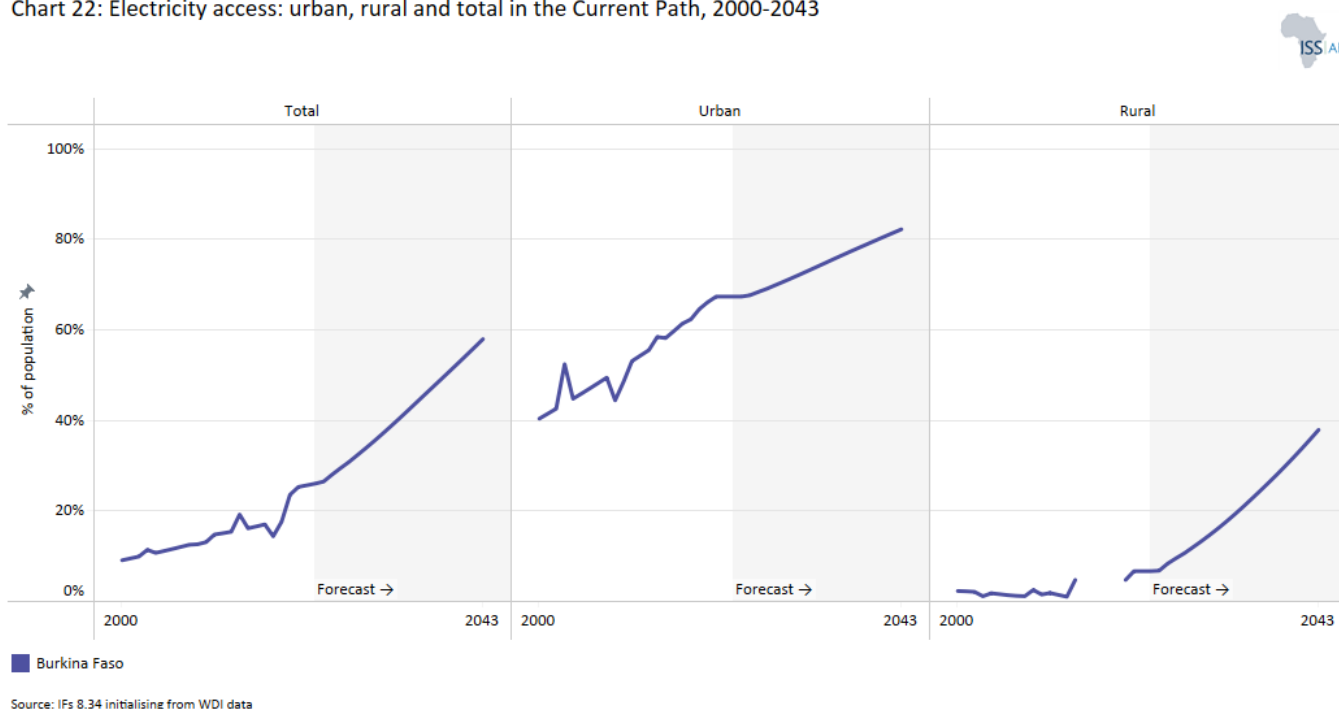


Chart 22 presents the Current Path of access to electricity for urban, rural and the total population from 2000 to 2043.

Burkina Faso faces significant infrastructure challenges that have hindered its economic development and growth. The country, like many in West Africa, has been constrained by insufficient infrastructure in key sectors such as transportation, energy, telecommunications and water supply.

In 2024, Burkina Faso ranked 29 out of 54 African countries on the African Infrastructure Development [Index](#) (AIDI) produced by the African Development Bank. Poor infrastructure coverage and low quality in Burkina Faso increase transaction costs and lower the return on capital and work, discouraging domestic and foreign investment and constraining economic growth.

Burkina Faso imports nearly 70% of its electricity from neighbouring Ghana and Côte d'Ivoire and faces unreliable and expensive electricity access. As of 2021, only 18.9% of the country's total population had access to electricity compared to about 37% for the average for low-income Africa. Access to electricity for rural populations is woefully low at 6.6% in 2021 compared with 67.6% in urban areas. Most rural communities rely on biomass (wood and charcoal) for their energy needs.

Even for those connected to the power grid, supply is often unreliable. This increases operational costs for industries and hampers manufacturing, which is already constrained by other infrastructure challenges.

Solar and wind energy offer Burkina Faso a pathway to expand energy access, reduce reliance on imported energy, and enable economic growth. Solar power is particularly advantageous for remote areas without access to the national grid. With abundant solar resources—averaging around 2 800 hours of sunshine and 5.5 kWh/m² of solar irradiance daily—Burkina Faso has the potential to develop up to [95.9 gigawatts](#) (GW) of solar capacity. The country has already

initiated projects like the Zagtouli solar power plant, the largest in the Sahel, and aims to source 30% of its electricity from solar by 2030. Additionally, Burkina Faso could harness up to 1.96 GW of wind energy, with numerous regions identified as suitable for wind power development.

On the Current Path, the national electricity access rate will improve to 35% in 2030 (still below the SDG target of 98%) and about 58% by 2043, with 37.9% in rural areas and 82.2% in urban areas (Chart 22).

The road network in Burkina Faso is also underdeveloped, with many rural areas poorly connected to urban centers. Only a small percentage (26% in 2023) of roads are paved, and those that are paved often suffer from poor maintenance. This limits the movement of goods and people and increases the cost of transportation. During the rainy season, many unpaved roads become impassable, further isolating rural communities and affecting the transportation of agricultural products to markets. On the Current Path, 33% and 48% of the total road network will likely be paved by 2030 and 2043, respectively.

Limited access to and poor quality of digital connectivity also limits Burkina Faso's growth potential. The mobile broadband subscriptions per 100 people were at about 61 in 2021, against an average of 27 for low-income Africa. On the Current Path, it will be 143.7 in 2030 and 154 by 2043.

Fixed broadband provides faster internet access speeds with more secure connections and is important for higher value-add service sectors. However, fixed broadband penetration in Burkina Faso is strikingly low, with a subscription rate of 0.07 per 100 people, below the average of 0.2 for African low-income. On the Current Path, fixed broadband subscriptions will be 4 and 16 per 100 people by 2030 and 2043, respectively.

In sum, the infrastructure deficit, especially poor access to electricity and the lack of a good road network are cited as some of the most significant obstacles to expanding the small private sector in the country. The Large Infrastructure and Leapfrogging scenario, therefore, addresses these issues. It involves ambitious investments in road and renewable energy infrastructure, improved electricity access and accelerated broadband connectivity. It emphasises adopting modern technologies to enhance government efficiency and the rapid formalisation of the informal sector, incorporating significant investments in major infrastructure projects like rail, ports, and airports while highlighting the positive impacts of renewables and ICT.

The interventions in the scenario bring the national access to electricity rate to 39% in 2030 and 74% in 2043 compared with 33.8% and 57.9% on the Current Path in 2030 and 2043, respectively. The share of paved roads in the total road network is 36% in 2030 and 57.8% in 2043 compared with 32.9% and 48% on the Current Path in 2030 and 2043, respectively. Fixed broadband subscriptions will be 4.8 and 24 per 100 people by 2030 and 2043, respectively compared with 4 and 16 per 100 people in the Current Path forecast.

Visit the themes on [Large Infrastructure](#) and [Leapfrogging](#) for our conceptualisation and details on the scenario structure and interventions.

Chart 23: Cookstove usage in the Current Path and Large Infra/Leapfrogging scenario, 2020-2043

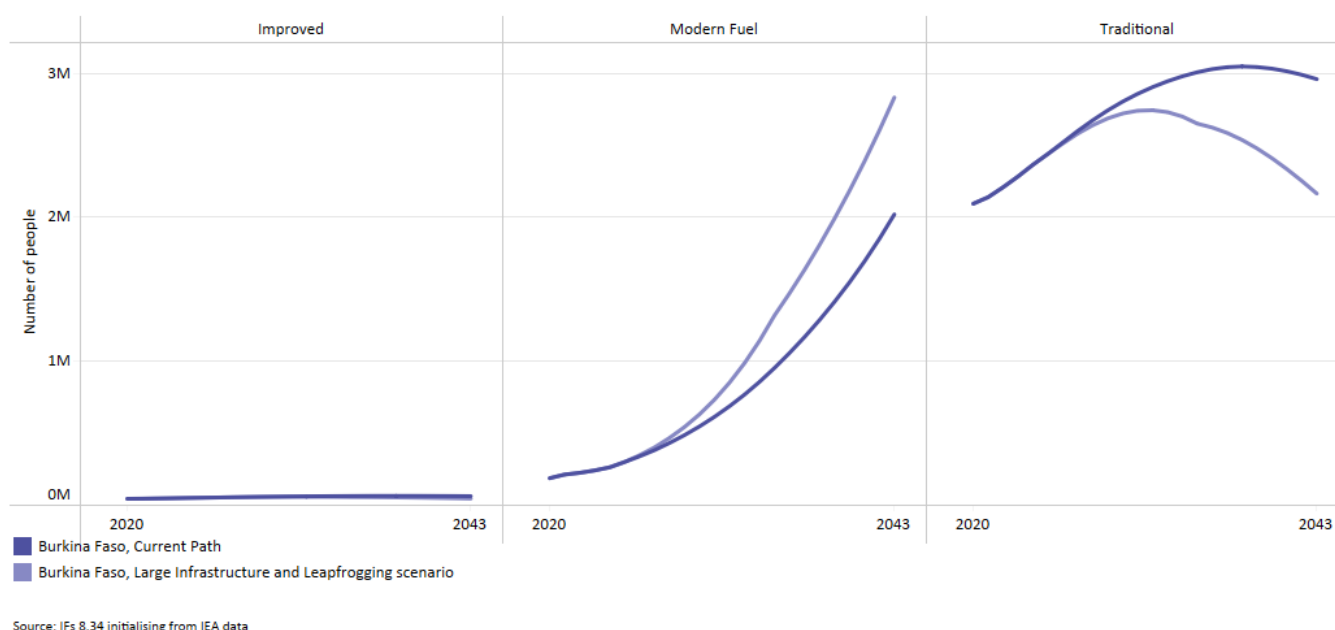


Chart 23 presents the number of people using cookstoves in the Current Path and in the Large Infrastructure and Leapfrogging scenario, from 2019 to 2043.

Due to limited electricity access, especially in rural areas, the bulk (81%) of Burkinabe households rely on inefficient energy sources for cooking such as firewood and charcoal (used in traditional cookstoves). In rural areas, nearly all energy consumption is biomass-based.

As a result, the national average firewood consumption stands at 0.69 kg per person per day. This poses a risk to the environment with the acceleration of deforestation and affects the health of infants and children by causing respiratory problems. Also, the daily collection of firewood (unpaid domestic work), which involves more women and young girls, limits their time for paid work and reduces study hours for girls, depriving them of opportunities to focus on education.

In the Large Infrastructure and Leapfrogging scenario, the percentage of households that use traditional cookstoves would decline from 88.7% in 2023 to 79.7% in 2030 and about 43% in 2043 compared to 58.7% in the Current Path for 2043.

The share of households using modern fuel cookstoves is 56% by 2043 in the Large Infrastructure and Leapfrogging scenario, compared to the Current Path of 40% in the same year. These findings imply that increasing access to modern energy, including electricity and off-grid renewable solutions, particularly in rural areas, can play a key role in reducing carbon emissions and mitigating climate change. By transitioning households from traditional cooking methods to modern alternatives, these measures lower emissions and reduce the burden of unpaid domestic work for women and girls. This shift can free up valuable time, enabling them to engage in paid work and study as well as leisure and personal care. For instance, rural electrification led to a 9% increase in female labour force participation through a reduction in the time women spent on housework in South Africa.

Chart 24: Access to mobile and fixed broadband in the Current Path and Large Infra/Leapfrogging scenario, 2020-2043

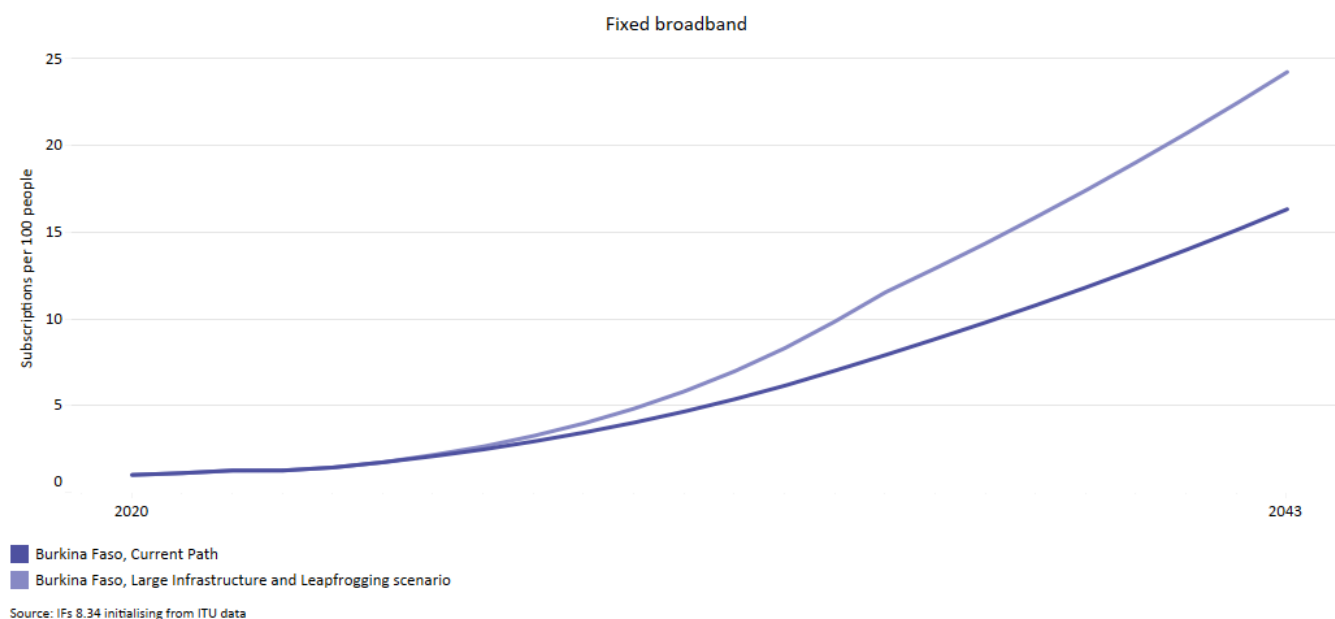


Chart 24 presents the percentage of the population and number of people with access to mobile and fixed broadband in the Current Path and in the Large Infrastructure and Leapfrogging scenario, from 2019 to 2043. The user can toggle between mobile and fixed broadband.

The mobile broadband subscriptions per 100 people will be 154.4 by 2043 in the Large Infrastructure and Leapfrogging scenario. Because the mobile broadband subscriptions are already approaching saturation levels on the Current Path, the intervention does not improve mobile broadband subscriptions above the Current Path.

In the Large Infrastructure and Leapfrogging scenario, fixed broadband subscriptions will reach 4.8 and 24 per 100 people by 2030 and 2043, respectively, compared with 16.3 in the Current Path for 2043.

Financial Flows scenario

Chart 25: FDI, foreign aid and remittances as % of GDP in the Current Path, 1990-2043

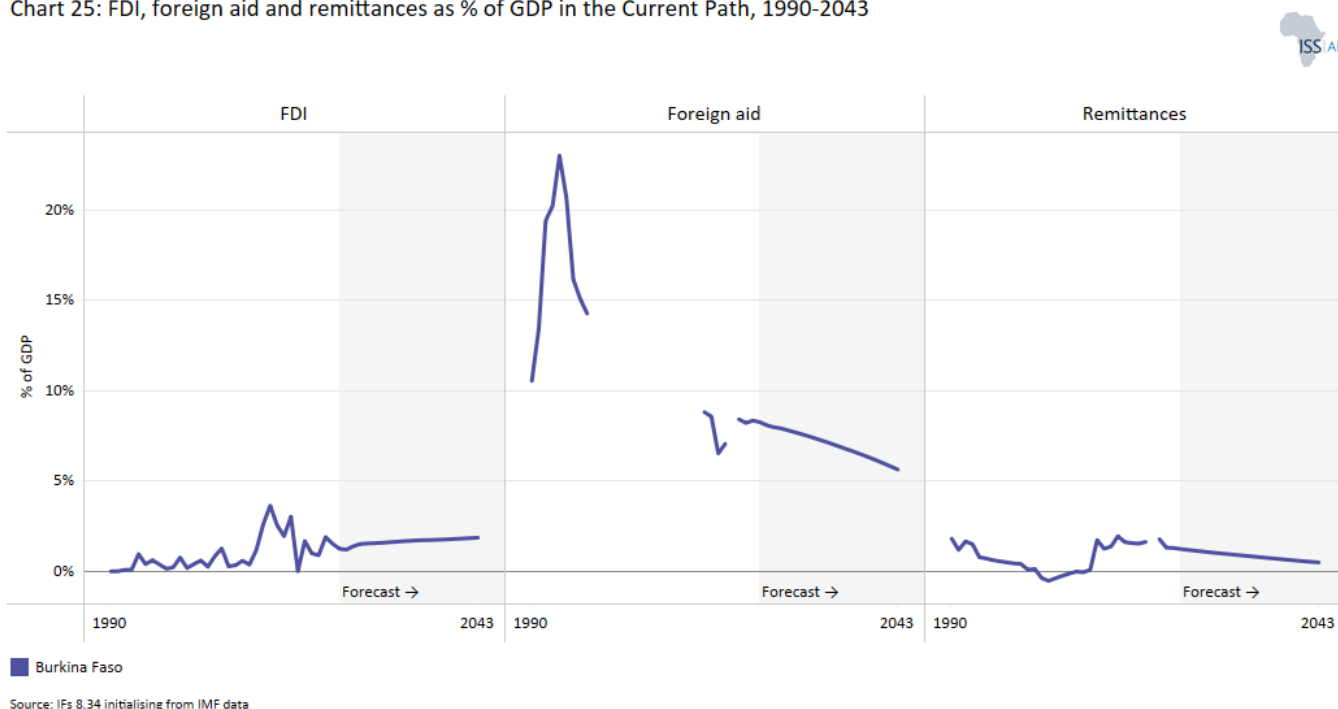


Chart 25 presents the trends in FDI, aid and remittances in the Current Path and in the Financial Flows scenario as a percentage of GDP, from 1990 to 2043.

Burkina Faso is not an important destination of international capital flows in Africa even though foreign aid plays a significant role in the country's economic and social development, given its limited financial resources and high levels of poverty. Aid from international donors and development partners is crucial in supporting sectors such as education, healthcare, infrastructure, governance and security. **Grants**—non-repayable funds from international organisations, and development partners to support specific projects, programs or general budget needs—represented the largest share of non-tax revenues in Burkina Faso in 2021, amounting to 2.5% of GDP and 57% of non-tax revenues.

Development partners have traditionally supported Burkina Faso in addressing key development challenges, including strengthening agricultural markets and production, improving maternal and child health, adapting to climate change, enhancing governance and human rights, reducing malaria rates and responding to complex crises.

For instance, in 2021, **USAID** allocated over **US\$5.5 million** toward agriculture and food security, targeting vulnerable communities, with a focus on women and youth. In 2024, the EU allocated **€45 million** for humanitarian aid in the country, a slight increase compared with €44 million in 2023. These funds support actions on (i) food insecurity and malnutrition, (ii) protection, (iii) health, (iv) nutrition, (v) shelter, (vi) water, sanitation and hygiene, (vii) education, (viii) disaster preparedness activities, and (ix) a rapid response to displacements.

The UN Office for the Coordination of Humanitarian Aid (OCHA) humanitarian response plan was allocated US\$316.1 million in 2020 compared to only **US\$148 million** in 2024 – only 16 percent of Burkina Faso's growing humanitarian aid needs.

Foreign aid represented about 8% of GDP in 2023. On the Current Path, aid flows to Burkina Faso as a percentage of GDP

will likely decline to reach 7.5% of GDP in 2030 and 5.6% in 2043 (see Chart 25).

In addition to aid, Burkina Faso actively welcomes foreign investment and seeks to attract international partners to support its development. The country has **made partial progress** in establishing the legal and regulatory framework needed to ensure fair treatment of foreign investors, including creating mechanisms for resolving commercial disputes and simplifying the processes for obtaining permits and registering businesses.

Gold mining has experienced significant growth over the past decade, with major companies from Canada, Australia, the United Kingdom, South Africa and Russia active in the sector. Moroccan, French and UAE firms control local subsidiaries in the telecommunications industry, while foreign investors are also active in banking, financial technology, agriculture, transport, logistics, energy and telecommunications. Interest in the security sector from foreign investors is also **increasing**.

In 2018, the parliament passed a new investment code offering numerous benefits to foreign investors, including tax breaks and incentives such as exemptions from value-added tax (VAT) on certain equipment. Although effective tax rates are lower than the regional average, the tax system is complex, and compliance remains **challenging**.

As of 2023, foreign direct investment (FDI) flows to Burkina Faso accounted for 1.2% of GDP. On the current trajectory, they will increase to approximately 1.6% of GDP by 2030 and 1.8% by 2043 (Chart 25). However, this optimistic outlook depends heavily on achieving greater political stability and significant improvements in security.

FDI flows to Burkina Faso are constrained by a range of economic, political and social challenges. The country faces significant security threats from insurgent violence and terrorism, which disrupt economic activities and pose direct risks to investments, particularly in the mining sector. Additionally, Burkina Faso's shift away from traditional Western alliances in favour of closer ties with nations like Russia may impact existing investments and influence future investor decisions, given the geopolitical implications.

Many Burkina Faso citizens who live abroad also send money back home (remittances). Remittances are a crucial lifeline for many households in Burkina Faso and neighbouring Côte d'Ivoire is one of the main sources. They ease the financial constraint of recipients, enhance their ability to avoid poverty and hunger, and promote gender equity in education.

In 2018 (latest available data), remittances represented 1.6% of GDP, and, on the Current Path, will decline to about 0.9% in 2030 and 0.5% of GDP by 2043.

In addition to their contribution to poverty reduction and human development, remittances tend to be less volatile to economic downturns than FDI and Portfolio Investment, and hence may help mitigate balance of payment difficulties if encouraged and facilitated.

An increase in foreign financial flows can bring considerable economic benefits to Burkina Faso and reduce its persistent balance of payment difficulties. However, as Western countries and international institutions often condition aid and investment on political stability, democratic governance and adherence to international norms, without meaningful political reforms or assurances of stability, the resumption of substantial Western aid and FDI inflows is unlikely.

However, non-Western countries, particularly those with strategic or economic interests in the region, might still consider investing or providing aid. Nations such as China, Russia and some Gulf states have shown a tendency to engage in regions with political instability, often prioritising resource access, geopolitical influence, or strategic partnerships over governance concerns. For instance, China has historically maintained a non-interventionist approach to politics and may seek opportunities in infrastructure, mining (especially gold), or energy sectors in Burkina Faso. Russia has expanded its

presence in Africa, particularly through security partnerships and mining investments. Companies and organisations with ties to Russia, such as Wagner Group affiliates, could pursue opportunities despite the political climate.

The Financial Flows scenario is a positive scenario which represents a reasonable but ambitious increase in inward flows of worker remittances, aid to poor countries and an increase in the stock of foreign direct investment (FDI) and additional portfolio investment inflows. We reduce outward financial flows to emulate a reduction in illicit financial outflows. The scenario is premised on a return to constitutionalism which is very likely a precondition for aid and FDI from Western countries.

Visit the theme on [Financial Flows](#) for our conceptualisation and details on the scenario structure and interventions.

Chart 26: Government revenue in the Current Path and Financial Flows scenario, 2020-2043

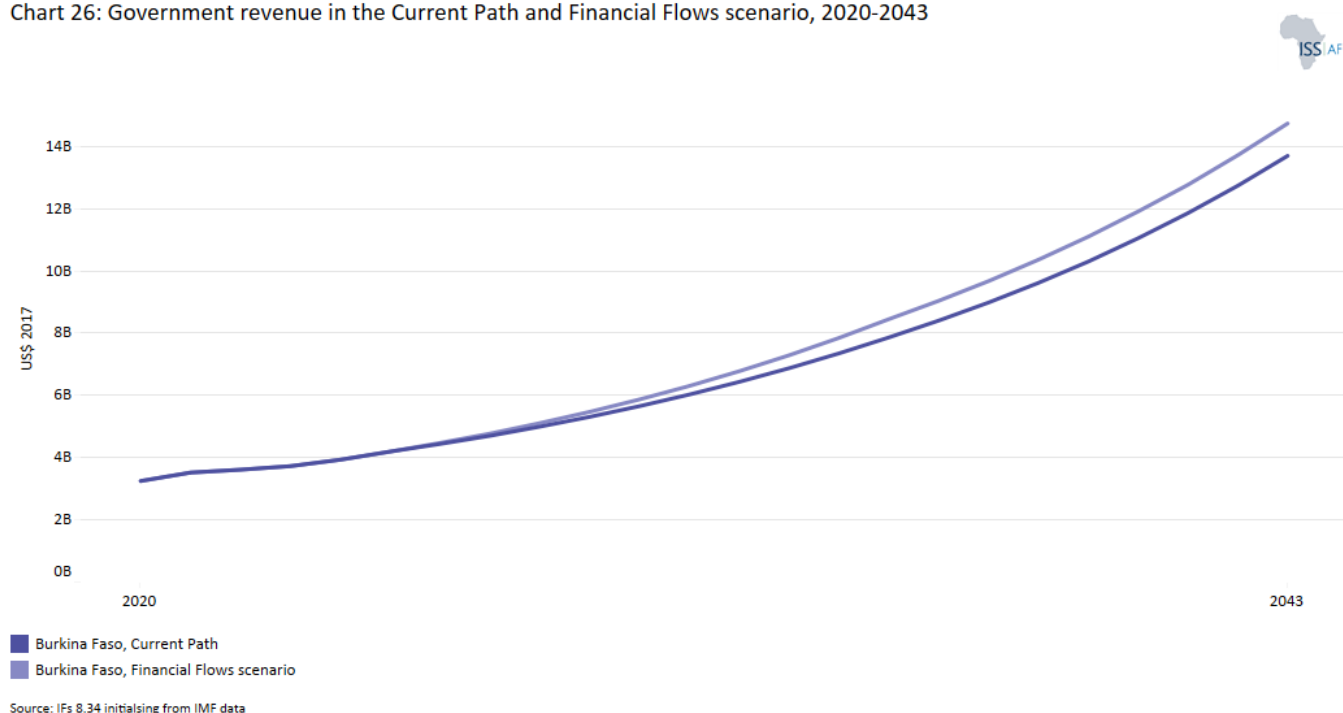


Chart 26 presents government revenue in the Current Path and in the Financial Flows scenario, from 2019 to 2043. The data is in US\$ 2017 and % of GDP.

In the Financial Flows scenario, FDI flows to Burkina Faso is equivalent to 2.2% of GDP in 2030 and 2.8% of GDP in 2043, below the projected average of 4.6% of GDP for low-income countries in Africa in 2043, and about one percentage point above the Current Path in 2043.

In this scenario, foreign aid will represent about 6.6% of GDP in 2043, compared with 5.6% of GDP in the Current Path for the same year. Remittances will represent 0.8% of GDP in 2043 compared with 0.5% of GDP in the Current Path for the same year.

In the scenario, government revenues increase to 24.7% of GDP by 2043, up from 20% in 2023. This is 1.14 percentage points of GDP above the Current Path in 2043, equivalent to US\$1.06 billion. Several pathways explain the positive association between capital inflows and government revenue. The first is direct because more aid means more revenue for the government to provide public services. Another is indirect: higher inflows are associated with higher tax revenues because foreign investors tend to have good tax compliance habits and/or are subject to higher natural resource taxes. Also, higher inflows is associated with higher economic growth and, therefore, higher government revenues.

Assuming a suspension of development aid to Burkina Faso over the next five years (2025 to 2030), with aid resuming thereafter premised on a return to constitutionalism, the size of the economy would be US\$188 million smaller in 2030 and US\$301 million smaller in 2043. The number of people living in extreme poverty would rise by 76 000 in 2043 compared to the Current Path forecast. The GDP per capita would decrease by approximately US\$12 by 2030 and US\$13 by 2043 compared to the business-as-usual scenario (Current Path). Cutting aid could therefore deepen underdevelopment in Burkina Faso.

Governance scenario

Chart 27: Government Effectiveness score in the Current Path, 2002-2043

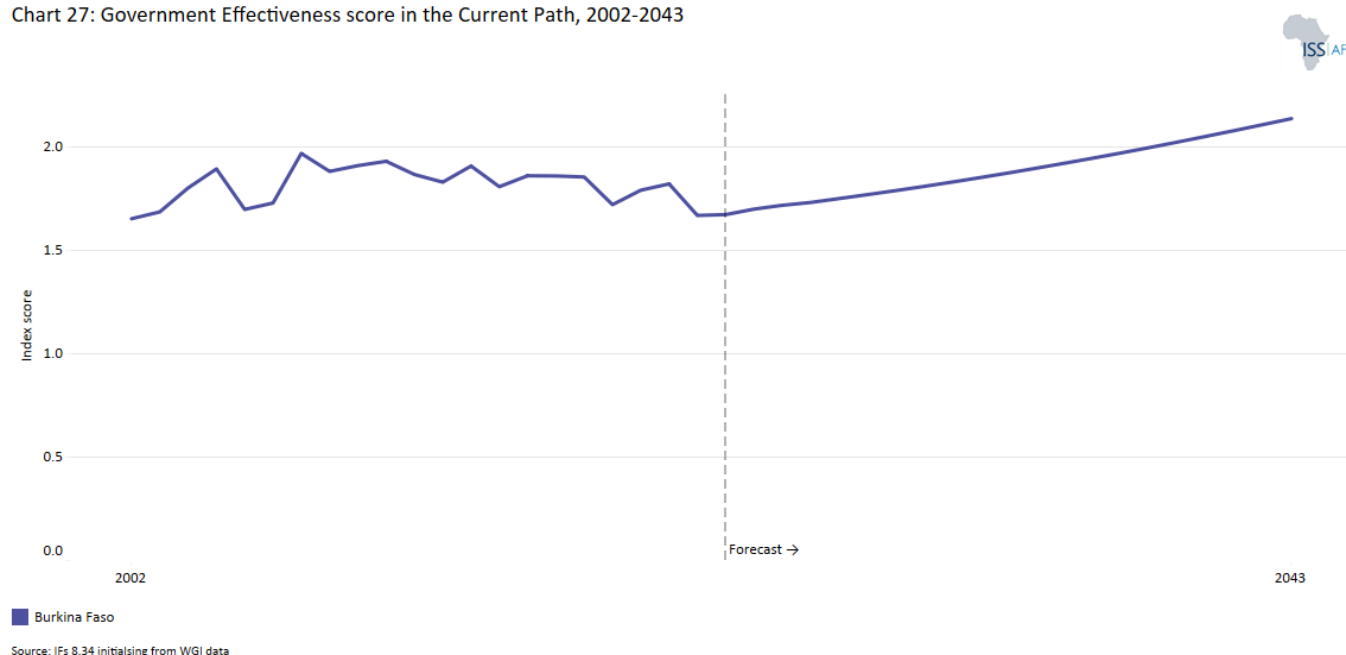


Chart 27 presents the Current Path of government effectiveness comparing the country to the average for the Africa income group, from 2002 to 2043.

Good governance is key to economic progress. Greater security and stability at the national level creates an enabling environment for domestic and foreign investment. It also creates conditions in which governments can pursue effective sustainable development strategies.

In our modelling, governance is **conceptualised** along three dimensions – security, capacity and inclusion – reflecting the traditional sequencing of the state formation process. The score for each dimension of governance ranges from zero (bad) to one (good). The security dimension measures the probability of intra-state conflict and the general level of risk. The second dimension, capacity, is related to government revenue, corruption, regulatory quality, economic freedom and government effectiveness. The third dimension, inclusiveness, measures the level of democracy and gender empowerment.

Key governance challenges in Burkina Faso include political instability, insecurity and extremism, and weak institutions. The country has experienced multiple coups, with the most recent ones in 2022, generally considered to be driven by dissatisfaction with government leadership and perceived bad governance, security issues, or public discontent given high levels of multidimensional poverty. This political instability disrupts governance processes and creates uncertainty in leadership. The country also faces a growing security threat from violent extremist groups, particularly in its northern and eastern regions. Groups linked to al-Qaeda and the Islamic State that operate in the Sahel contribute to violence and displacement of populations. The insecurity has undermined the state's authority and ability to deliver services. The spread of Islamist terrorism has resulted in the loss of approximately **40%** of national territory and limited access to public services. Thousands of schools and health facilities have been closed, disproportionately affecting access to these services.

With a score of 51.0 out of 100 - where 100 indicates the full provision of political, social and economic public goods and services that a citizen expects from his/her government and the state has responsibility to deliver to its citizens - Burkina

Faso ranked 24th of 54 African countries on the [2023 Ibrahim Index of African Governance \(IIAG\)](#), an improvement from the 18th rank it recorded in previous years. Burkina Faso's score is above the African average (49.3) and the regional average for West Africa (52.6).

With a score of 1.67 out of a maximum of 5 in 2022 (latest available data), Burkina Faso ranked 24th of 54 countries in Africa in terms of government effectiveness as measured by the World Bank. On the Current Path, the governance effectiveness score will slightly increase to 1.8 in 2030 and 2.1 (out of 5) by 2043, above the projected average score of 1.7 for low-income African countries (Chart 27).

The Governance scenario assumes better governance: stability, capacity, and inclusion. It measures a state's progress using the average of these three indices. To this end, it includes an index (0 to 1) for each dimension, with higher scores indicating improved outcomes. The scenario also increases government spending on social protection to protect vulnerable people and this is financed by a more regressive taxation rather than borrowing.

Visit the theme on Governance for a full conceptualisation and details on the scenario structure and interventions.

Chart 28: Composite governance index in the Current Path and Governance scenario, 2023-2043

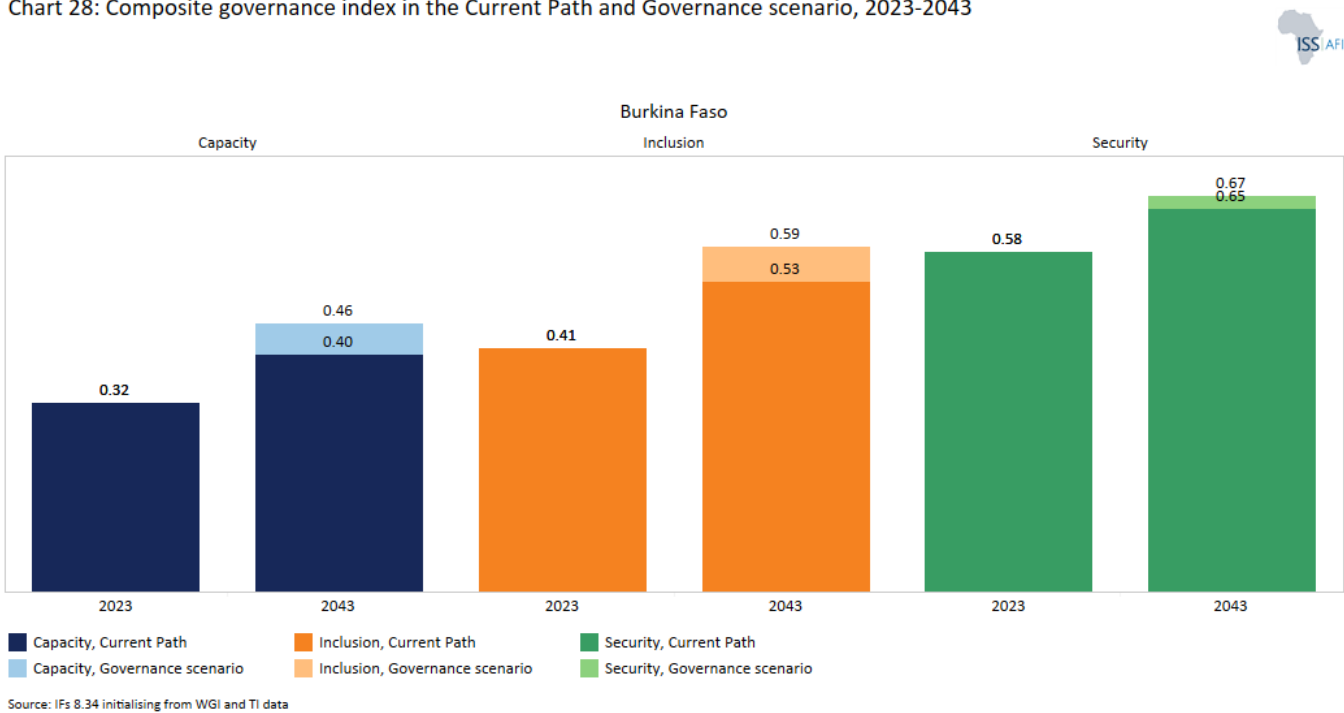


Chart 28 presents the security, capacity and inclusion index for the Current Path versus the Governance scenario, for 2023 and 2043.

Burkina Faso was generally peaceful until 2015 which saw a significant rise in Islamist terrorism in the country. Similar to its neighbours Mali and Niger, Burkina Faso faces several security challenges since then. These include the Sahelian insurgency led by The Islamic State in the Greater Sahara (ISGS) in northern Tillabéri, and the al-Qaeda-affiliated Jama'at Nusrat Al Islam (JNIM) activity in south-western Tillabéri. According to an [ACLED report](#), more recently, 'Burkina Faso has become the epicentre of the regional conflict' and has replaced Mali. Burkina Faso faces a dire humanitarian crisis. According to the UN Refugee Agency (UNHCR), over 2 million people are internally displaced. The country also hosts 38 000 refugees, mostly of Malian origin. The number of people in need of humanitarian assistance increased by 35% between 2022 to 2023, from 3.5 million to almost [4.7 million](#).

As a result, Burkina Faso performs poorly in terms of security compared to many low-income countries in Africa, with a score of 0.58 out of 1, the country ranks 17th out of 22 low-income countries.

The country also performs poorly in terms of government capacity, with a score of 0.3 out of 1. This reflects the low level of government revenue, poor regulatory quality, and weak government effectiveness. Burkina Faso's [tax-to-GDP ratio](#) in 2021 (15.6%) was on par with the average for sub-Saharan Africa (15.6%), but the worsening security situation in the country and the Sahel has resulted in a higher portion of government spending being directed towards national defence. This shift has diminished the limited public resources available for other sectors, including critical pro-poor social sectors like education and health. Additionally, the influx of refugees from neighbouring Mali has further strained the already overburdened public service providers.

The military coups in Burkina Faso have likely had a significant impact on inclusion in Burkina Faso in various ways, particularly in governance, economic participation and social equity. The coups have sidelined democratic institutions, limiting opportunities for diverse representation and participation in decision-making. Key groups, including women, youth and marginalised communities, may face reduced influence in governance under military rule. Elections, political party activities and other inclusive mechanisms for representation have been disrupted, eroding pathways for broader societal participation in leadership. Burkina Faso's score on the inclusion index was 0.4 out of 1 in 2023 compared with 0.54 in 2020.

On the Current Path, Burkina Faso will make progress in all three dimensions of governance. As a result, the country's score on the composite governance index, which is a simple average of the three dimensions of governance mentioned above, will be about 32.5% higher in 2043 than its level in 2023 (Chart 28). In the Governance scenario, the overall governance performance of Burkina is 9.6% higher than the Current Path in 2043, and 14% above the projected average for low-income African. It assumes an early return to civilian rule as indeed promised by the military.

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