



Republic of the Congo

Republic of the Congo: Current Path

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Last updated 13 December 2023 using IFs v7.63

Table of contents

Republic of the Congo: Current Path	3
Republic of the Congo: Current Path forecast	3
Demographics: Current Path	5
Economics: Current Path	8
Poverty: Current Path	13
Carbon Emissions/Energy: Current Path	15
Endnotes	17
Donors and Sponsors	17
Reuse our work	17
Cite this research	17

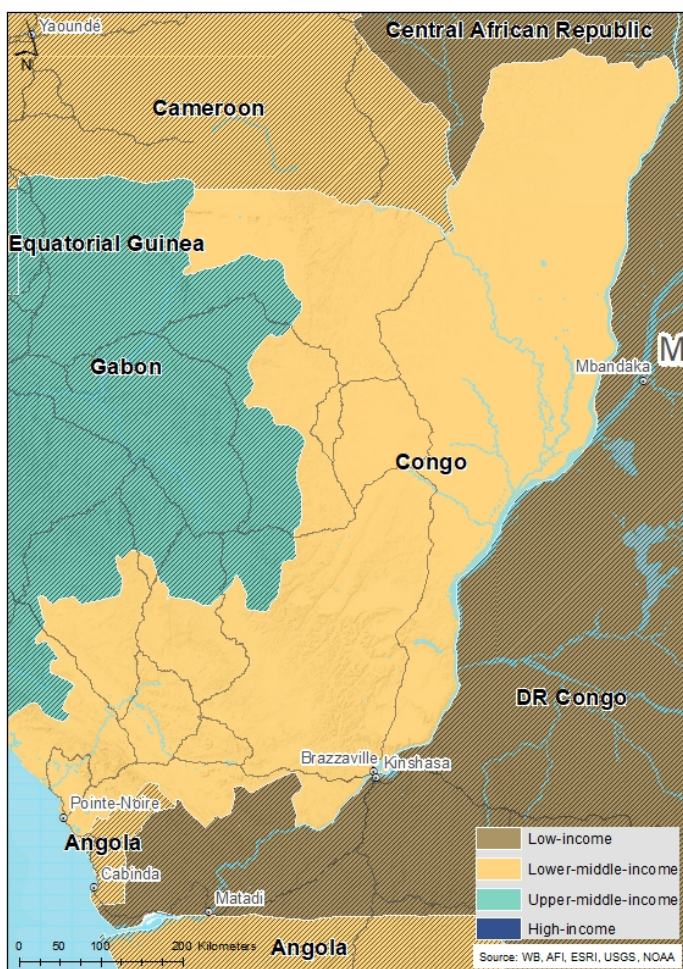
Republic of the Congo: Current Path

- [Republic of the Congo: Current Path forecast](#)
- [Demographics: Current Path](#)
- [Economics: Current Path](#)
- [Poverty: Current Path](#)
- [Carbon Emissions/Energy: Current Path](#)



Republic of the Congo: Current Path forecast

Chart 1: Political Map of the Republic of the Congo



This page provides an overview of the key characteristics of the Republic of the Congo along its likely (or Current Path) development trajectory. The Current Path forecast from the International Futures forecasting (IFs) platform is a dynamic scenario that imitates the continuation of current policies and environmental conditions. The Current Path is therefore in congruence with historical patterns and produces a series of dynamic forecasts endogenised in relationships across crucial global systems. We use 2019 as a standard reference year and the forecasts generally extend to 2043 to coincide with the end of the third ten-year implementation plan of the African Union's Agenda 2063 long-term development vision.

The Republic of the Congo is a lower middle-income country located in the Central Africa region and borders the Central

African Republic, Cameroon, Equatorial Guinea, Gabon, Angola, and the Democratic Republic of the Congo (DR Congo). The country is one of the five founding members of the [Economic Community of Central African States \(ECCAS\)](#) regional economic community, and does not hold membership with any of the other seven regional economic communities recognised by the African Union — a rarity on the continent. The country's capital city, Brazzaville, is located in the south-eastern part of the country on the banks of the Ubangi river, a tributary of the Congo, directly across from the DR Congo's capital of Kinshasa. The country's second largest city, Pointe-Noire, is situated on the coast and is vital to the country's economy. The city is key to the Congo's petroleum sector, which is a major source of government revenue, and is connected by rail to the capital, easing the transport of goods. Furthermore, Pointe-Noire is the only deepwater port in Central Africa,[1] and acts as an important trans-shipment port for other ports situated in Angola and the DR Congo.[2]

The Congo has a tropical climate and experiences year-long humidity and high temperatures due to its proximity to the Equator. The northern regions of the country consist mostly of sparsely populated rainforest, which covers nearly 66% of the country's land area. Of the remaining 34%, permanent pasture takes up the most space, meaning the area available for other forms of agriculture is greatly reduced.[3]

The negative effects of climate change have been keenly felt in the Congo, with floods in late 2021 adding to the list of extreme weather events the country has had to endure in recent times. The country ranked 109th on the Global Climate Risk Index in 2021, which indicates a moderate to high level of exposure and vulnerability to these extreme events, and warns of possible increases in the frequency of such events. Worryingly, the country also ranks low on the Notre Dame GAIN index, which ranks the ability of country's to adapt to the effects of climate change.[4]



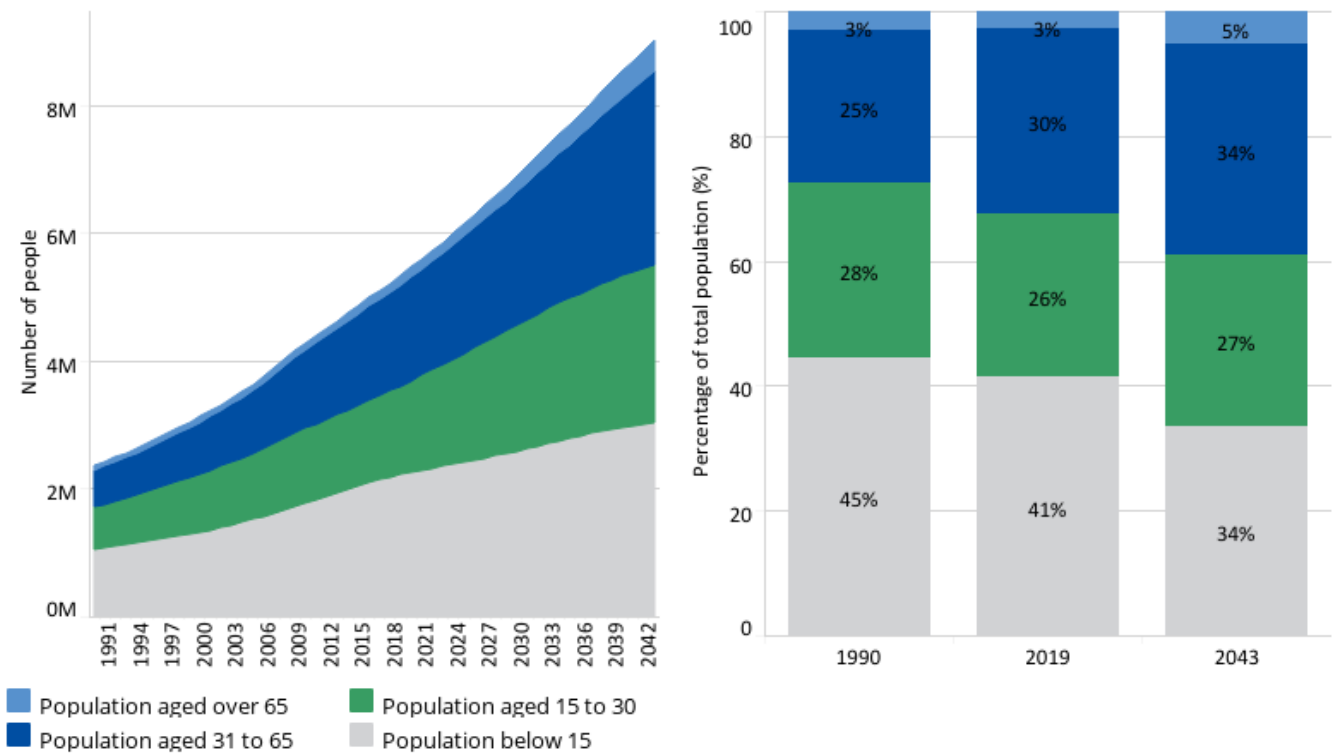
Demographics: Current Path

Chart 2: Population structure in CP, 1990–2043

By cohort and % of population



Congo, Rep of



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate and World Development Indicators population data

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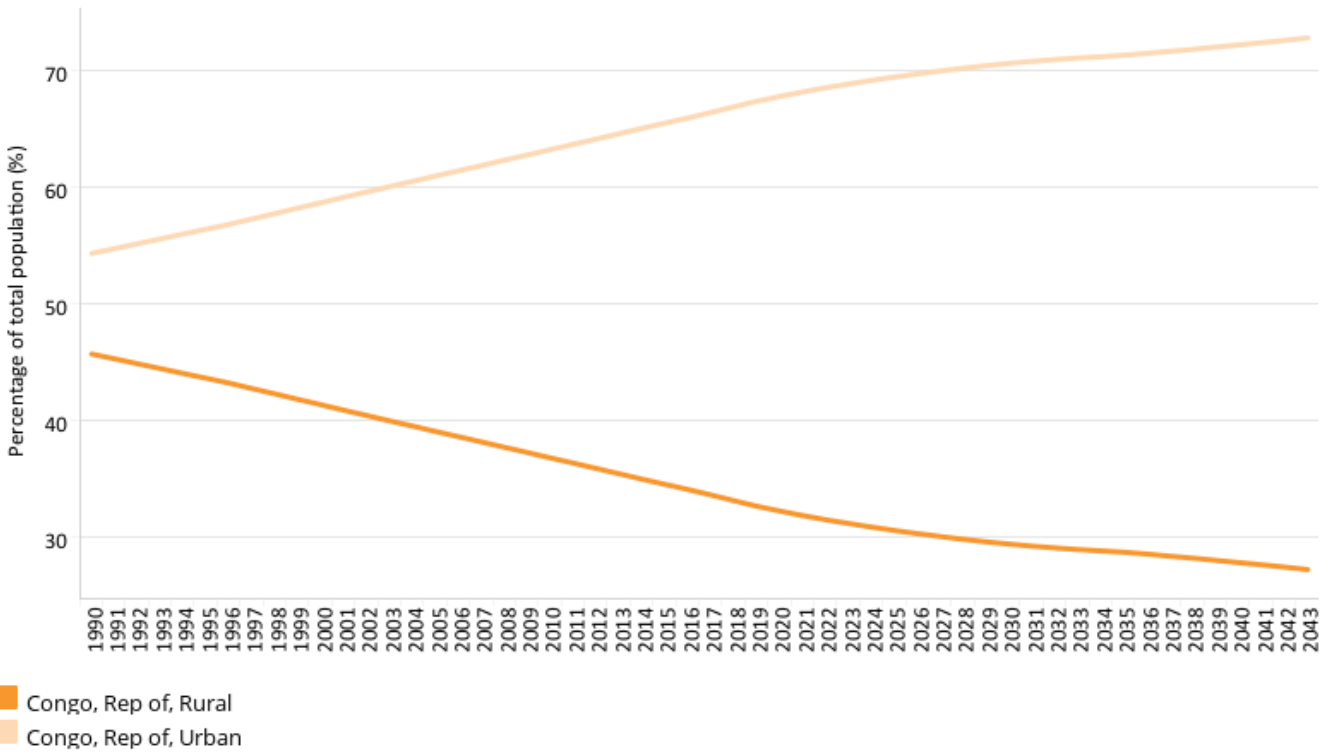
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The population of the Republic of the Congo has been growing rapidly in the period from 1990 to 2019, growing from 2.5 million people to 5.3 million people in that time — an increase of 112%. The rate will lessen over the forecast horizon: by 2043 the total population will equate to 9 million people, an increase of 69.8%. The structure of the population will also change in that time: those of working age will constitute 61% of the population in 2043, compared to 56% in 2019. The gradual maturation of the populace will reduce the dependency ratio and afford the country developmental benefits, provided the growing labour force is properly educated and can find employment opportunities.

Chart 3: Urban and rural population in CP, 1990–2043
% of population



Congo, Rep of



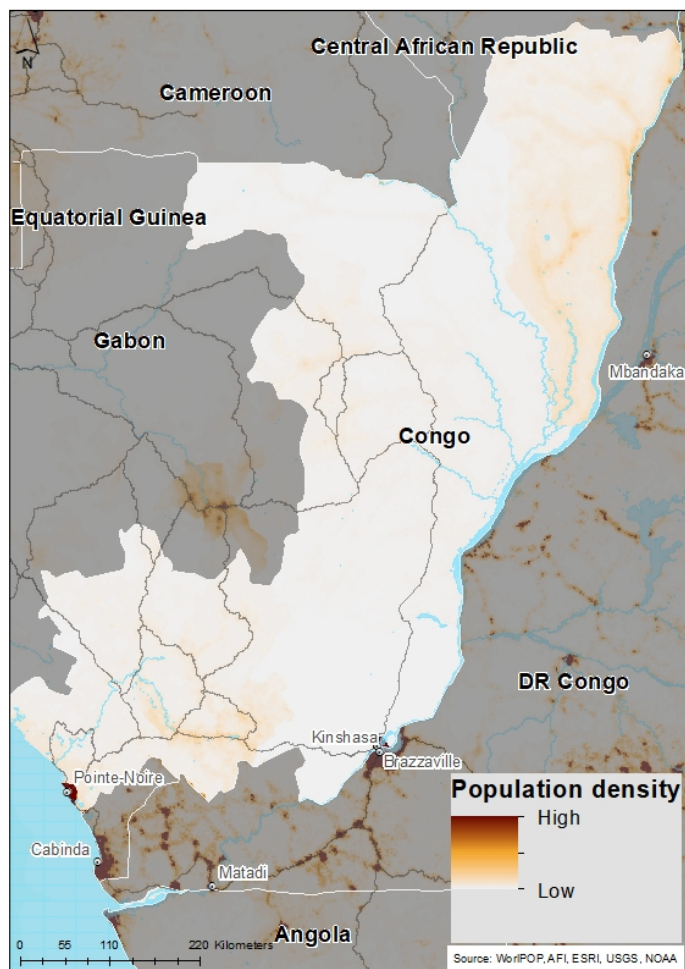
Source: IFs 7.63 initialising from UN World Urbanization Prospects estimate

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The Congo is one of the most urbanised countries in Africa. In 1990, 54.3% of the population was already living in urban areas, and by 2019, the urban population accounted for 67.4% of the total population, meaning that less than a third of the Congolese population lived in rural areas. Poorly managed urbanisation due to a lack of resources and institutional capacity at both local and national level has resulted in the living environment in urban areas slowly deteriorating. [5] The majority of the populace are clustered in Brazzaville, Pointe-Noire and the railway between the two cities, while the north-eastern reaches are sparsely populated. These areas will become more densely populated over the forecast horizon, with 72.9% of population centred in urban areas by 2043. These areas are ill-prepared for the growing threat of extreme weather events related to climate change, as previous occurrences have either destroyed or weakened key infrastructure. [6] Restoration of infrastructure and adequate planning for the projected increase in urban dwellers is needed to guard against increasing fatalities and costs.

Chart 4: Population density map for 2019

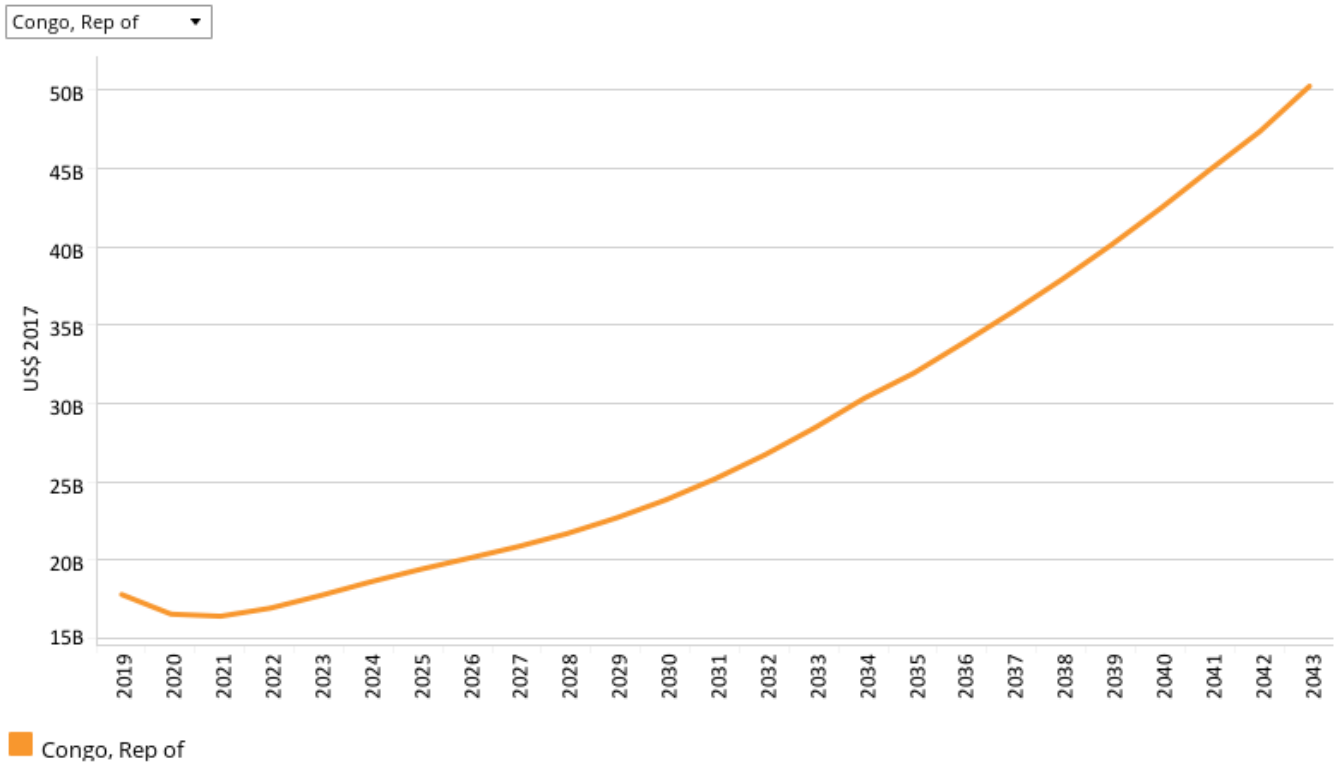


The highly urbanised population of the Congo is highly clustered around the country's two biggest cities of Brazzaville and Pointe-Noire. The country had the seventh lowest population density in Africa in 2021, with the vast majority of the population clustered around these two cities, due to the country's northern region of tropical jungle being very sparsely populated. Indeed, in 2019, 64.8% of the country was covered by forests and jungle, while only 1.9% was available for crops but 30% for grazing. The areas outside of the urban centres are not utilised for economic activity as the country has moved away from forestry towards oil extraction and does not have a well-developed agriculture sector.



Economics: Current Path

Chart 5: GDP in CP, 1990–2043
Market exchange rates



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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The Republic of the Congo’s economy has been hampered at various points by civil conflict and downturns in oil prices, the country’s main export, leading to lacklustre growth and periods of economic downturn from 1990 to 2019. The 1990s saw the GDP only rise from US\$8.4 billion in 1990 to US\$9 billion by 1999 as the country endured multiple episodes of internal conflict and violence, which culminated in a two-year civil war at the end of the decade.[7] After the signing of a truce and the drafting of a new constitution, the country could focus on growing the economy and did so effectively: GDP doubled to US\$18.5 billion by 2015, before a drop in oil prices meant the economy contracted to reach US\$17.8 billion by 2019. Crude oil accounts for more than 80% of the country’s exports, making it one of the top 10 producers in Africa. This heavy dependency on oil exports puts the economy at the mercy of volatile international oil prices. An economic recession caused by the COVID-19 pandemic and the associated oil price collapse necessitated an IMF loan of US\$455 million at the start of 2022 to assist the Congo’s post pandemic recovery.[8] One crucial aspect of future growth is the effective management of the country’s debt, mostly incurred by the state-owned oil company *Société Nationale des Pétroles du Congo*, which needed to be restructured to secure the loan.[9]

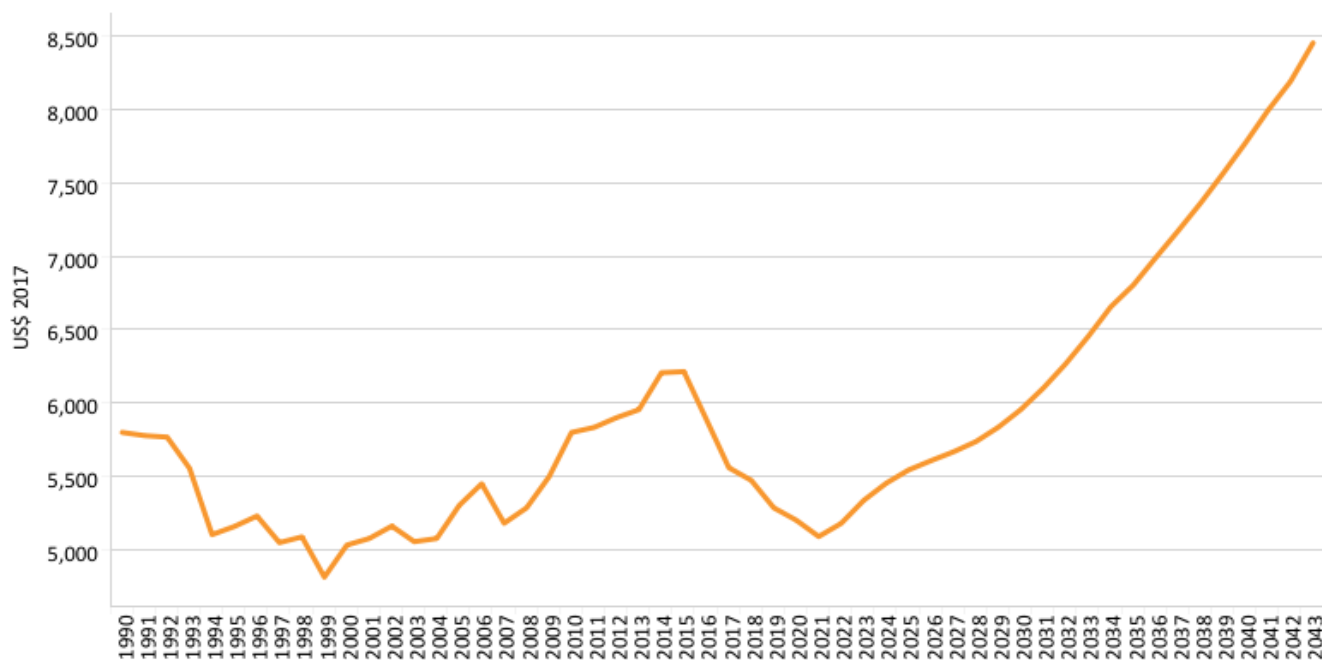
Encouragingly, oil output is forecast to increase by 1% in the near term as large producers resume their investment in the economy.[10] In the long term however, the country would fare better if the economy were more diversified, meaning fluctuations in oil prices would have less effect on the economy. To this end, the new national development plan which was adopted in early 2022 aims at greater economic diversification and will focus on improving six key sectors, namely

agriculture, tourism, the digital economy, real estate, industrial development and the creation of free economic zones.[11] In the Current Path forecast, the country's GDP will see robust growth, growing by 183% from 2019 to 2043 to reach US\$50.3 billion.

Chart 6: GDP per capita in CP, 1990–2043
Purchasing power parity



Congo, Rep of



Congo, Rep of

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

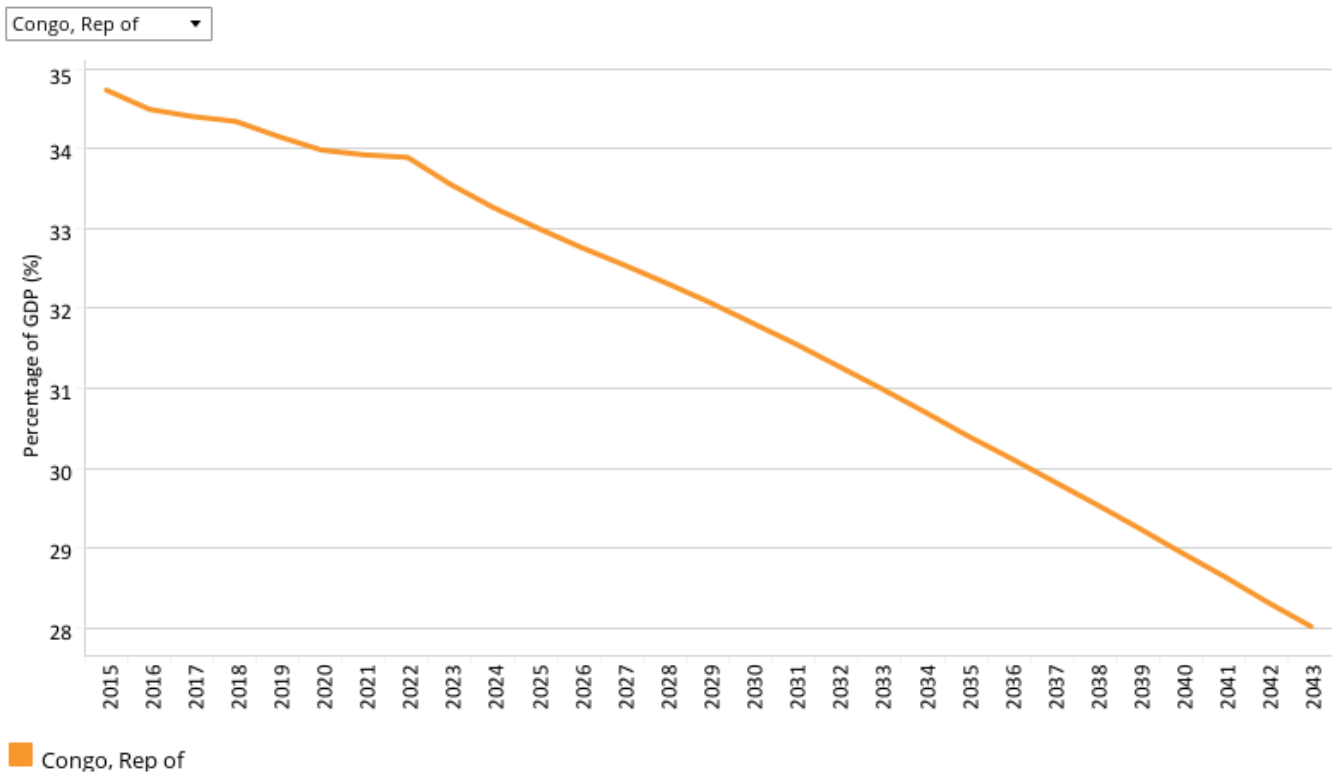
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Although many of the charts in the sectoral scenarios also include GDP per capita, this overview is an essential point of departure for interpreting the general economic outlook of the Republic of the Congo.

The Congo has seen its GDP per capita fluctuate considerably between 1990 and 2019, reaching a low of US\$4 819 in 1999 and a high of US\$6 215 in 2015, before rapidly declining to US\$5 290 by 2019. The country's heavy dependence on oil exports explain the variance: when the price of oil declined sharply in 2015 and 2016 due to increased production from the US,[12] the Congo's GDP per capita tumbled to below its 1990 level of US\$5 802. In the Current Path forecast, the country will only surpass this level again in 2029, before reaching a GDP per capita of US\$8 449 by 2043. Despite the slow recovery from shocks in oil prices, the Congo will continue to outperform both its Central Africa peers and Africa's average GDP per capita. Compared to its lower middle-income peers, the Congo will continue to trail over the forecast horizon, but the gap will close from US\$1 699 in 2019 to US\$693 by 2043.

Chart 7: Informal sector value in CP, 2015–2043
% of GDP



Source: IFs 7.63 initialising from UN Economic Commission for Europe [2008]; Elgin and Oztunali [2012]; Schneider and Enste [2012]

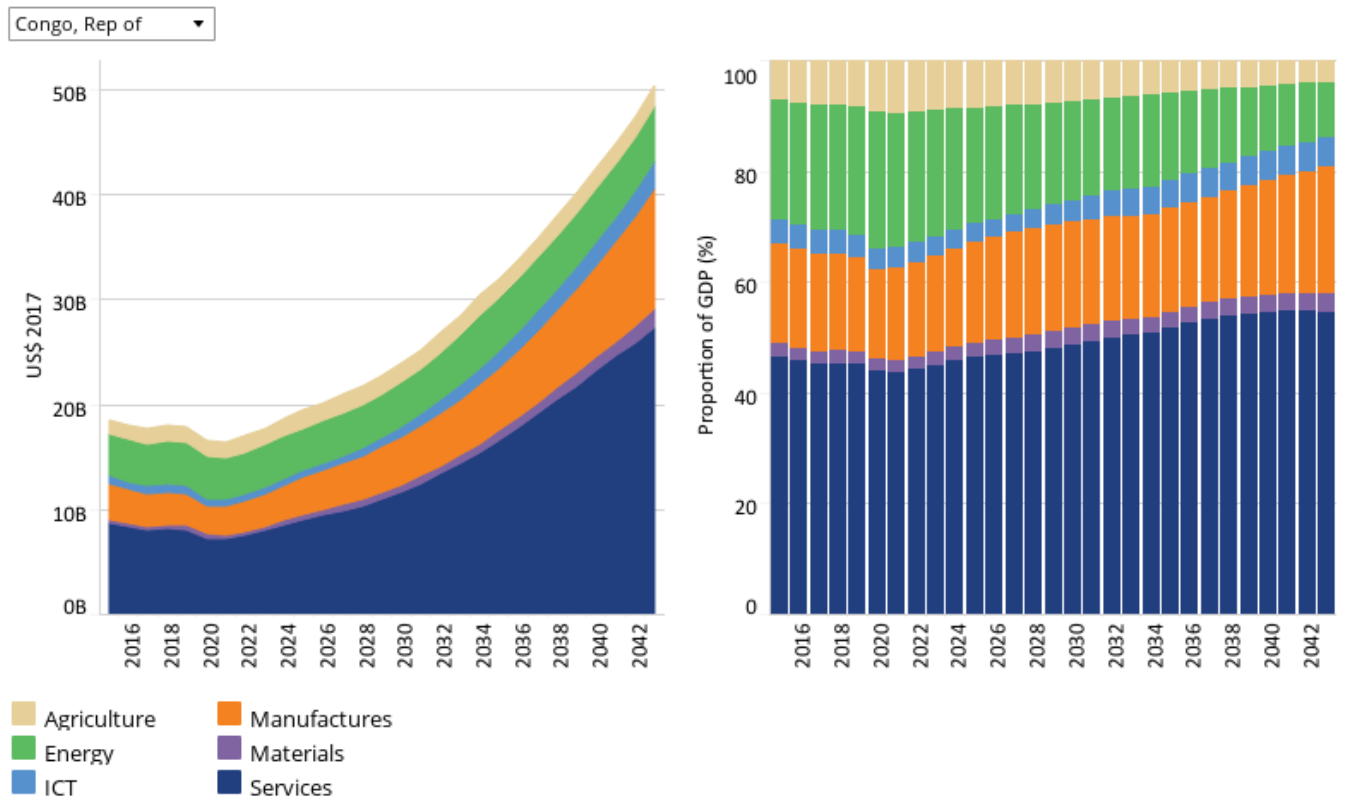
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The informal sector of the Congo is large, and its value as a percentage of GDP was 34.2% in 2019 was higher than the average for both low- and lower middle-income economies in Africa, and 8.3 percentage points above Africa’s average. The informal sector serves as a means of survival for poor people, and the size of the informal sector correlates with the country’s high poverty rate of 66.2% in 2019.

The advantages of formalisation for a country are myriad: the labour employed in the formal sector is more productive, they are better protected, and the government benefits from increased revenue due to a broad tax base. The Congolese government in particular will benefit, as fluctuating global oil prices often lead to budget deficits which impinge on planned spending and attempts at development. Encouragingly, the country will see the value of its informal sector drop to 28% by 2043, closing the gap to lower middle-income Africa to 1.6 percentage points, down from 5 percentage points in 2019.

Chart 8: Value added by sector in CP, 2015–2043
Billions US\$ 2017 and % of GDP



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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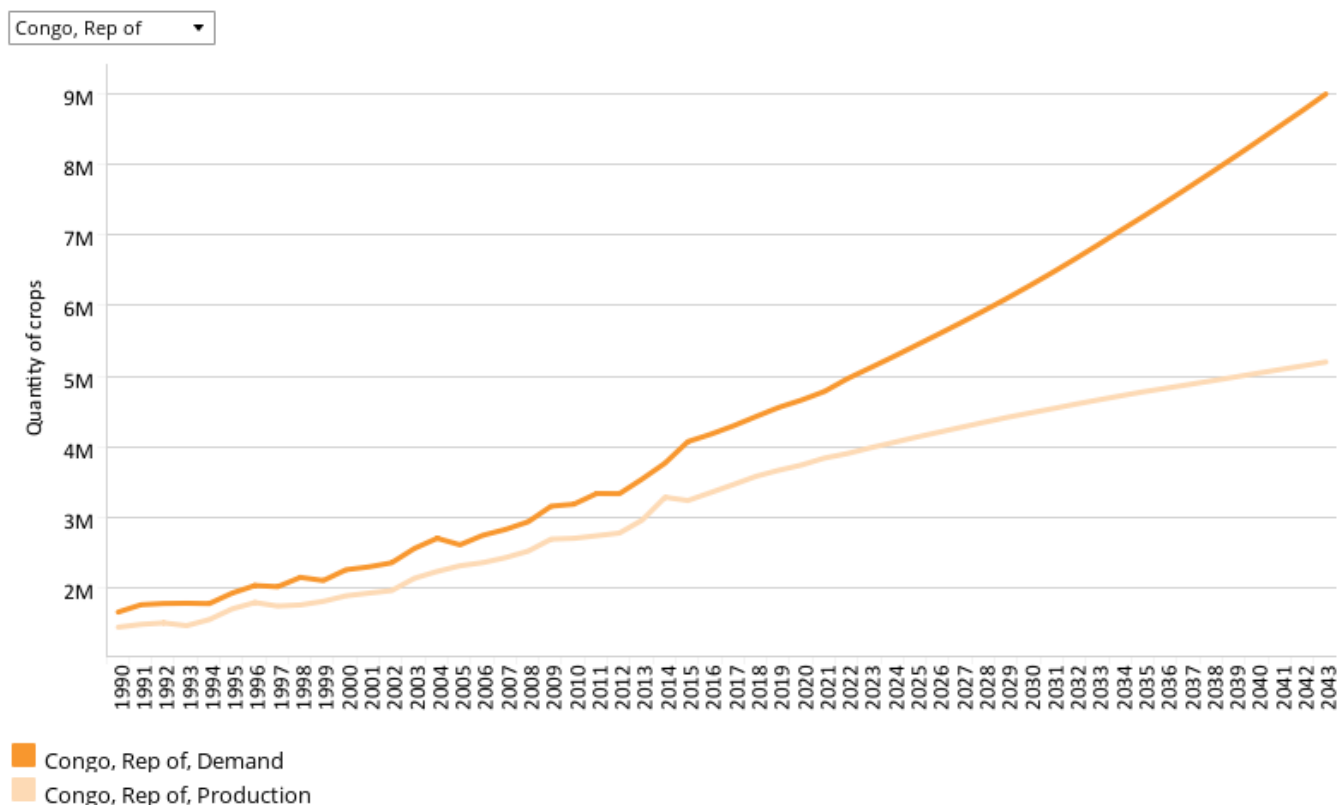
The IFs platform uses data from the Global Trade and Analysis Project (GTAP) to classify economic activity into six sectors: agriculture, energy, materials (including mining), manufacturing, services and information and communication technologies (ICT). Most other sources use a threefold distinction between only agriculture, industry and services with the result that data may differ.

The Congo’s economy is anchored by an industrial sector based on the extraction of oil and related support services. The agriculture sector is not well developed and consists mostly of subsistence farming, which translates to the small role that the sector plays in overall GDP:[13] in 2019, agriculture accounted for 8.4% of GDP. In contrast, the energy sector’s contribution stood at 23% of GDP in 2019, while the service sector accounted for 45.3% at that time. A positive development in the energy sector is the increased conversion of natural gas into electricity instead of being flared after extraction, a shift which will positively affect electricity access in the country.[14]

The manufacturing sector also constitutes a healthy portion of the economy, reaching 17.1% of GDP in 2019, with its share growing to 22.9% by 2043. The potential of the sector is constrained by a lack of skilled labour and small domestic markets, which if addressed could unlock sustained economic growth for the Congo.[15]

Chart 9: Agriculture production/demand in CP, 1990–2043

Crops million tons



Source: IFs 7.63 initialising from Food and Agriculture Organization Food Balance Sheets

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The data on agricultural production and demand in the IFs forecasting platform initialises from data provided on food balances by the Food and Agriculture Organization (FAO). IFs contains data on numerous types of agriculture but aggregates its forecast into crops, meat and fish, presented in million metric tons. Chart 9 shows agricultural production and demand as a total of all three categories.

The gap between agricultural production and demand in the Congo has been growing since 1990. Demand outpaced supply by 300 000 tons of crops in 1990, a margin which grew to 900 000 tons by 2019. In the Current Path forecast, the gap will continue to widen and reach 3.8 million tons of crops by 2043. The robust population growth over the forecast horizon coupled with low agricultural productivity explains the growing gap. To avoid a situation where a majority of the population is dependent on food imports, interventions are needed to increase food production.



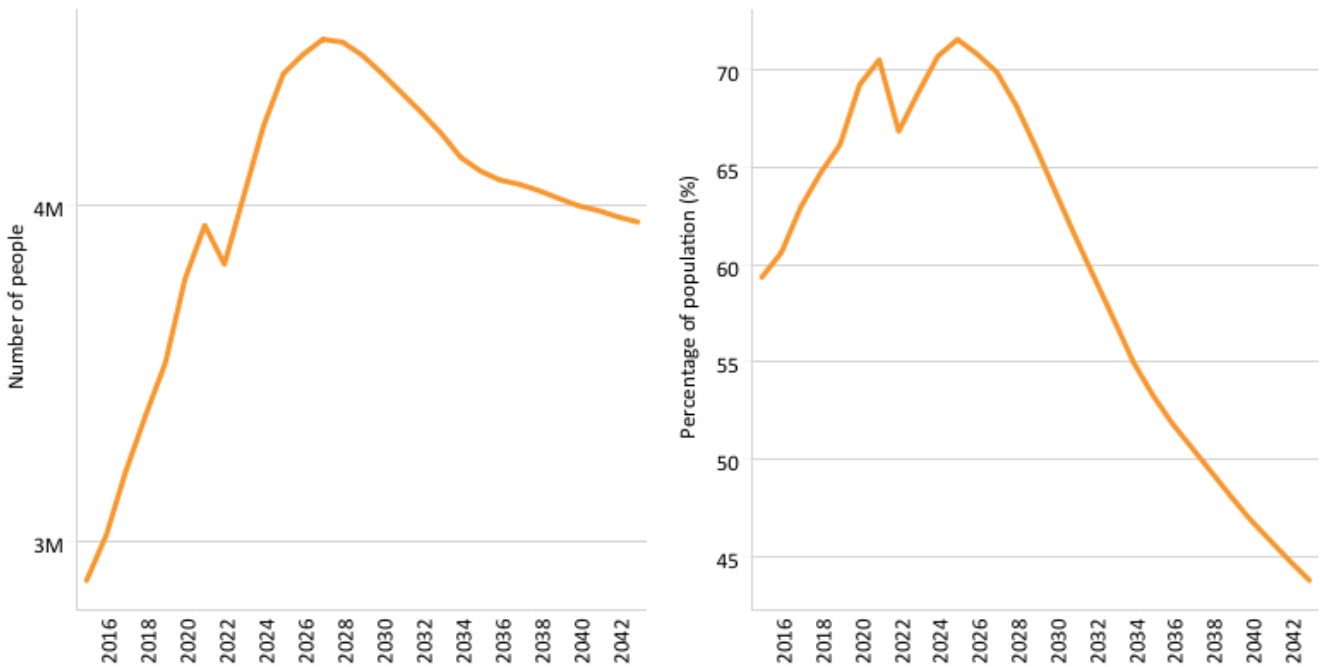
Poverty: Current Path

Chart 10: Poverty in CP, 2015–2043

Millions of people and % of total population



Congo, Rep of \$3.20



Congo, Rep of

Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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There are numerous methodologies for and approaches to defining poverty. We measure income poverty and use GDP per capita as a proxy. In 2015, the World Bank adopted the measure of US\$1.90 per person per day (in 2011 international prices), also used to measure progress towards the achievement of Sustainable Development Goal (SDG) 1 of eradicating extreme poverty. To account for extreme poverty in richer countries occurring at slightly higher levels of income than in poor countries, the World Bank introduced three additional poverty lines in 2017:

- US\$3.20 for lower middle-income countries
- US\$5.50 for upper middle-income countries
- US\$22.70 for high-income countries.

The Republic of the Congo had one of the highest poverty rates in Africa in 2019 at 66.2%. The rate translates to 2.9 million poor people in 2019, which will rise rapidly to 4.5 million by 2027 due to high levels of population growth. The poverty rate will in turn rise up until 2025, reaching a peak of 71.5%, before falling gradually to 43.8% by 2043.

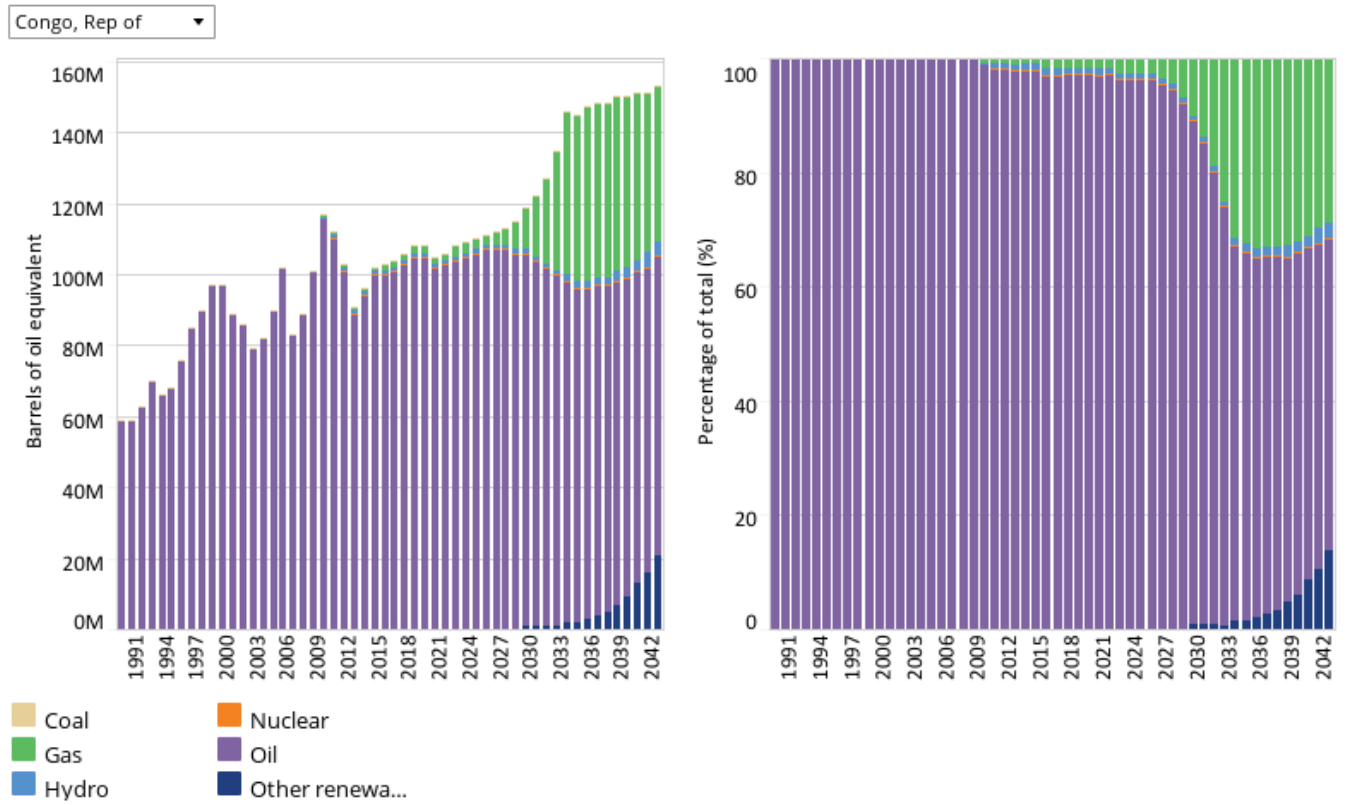
The country trailed behind Africa's other lower middle-income countries in 2019, and will continue to do so over the forecast horizon: the Congo's poverty rate was 16.1 percentage points higher than the average for lower middle-income

Africa in 2019, a gap which will fall to 5.5 percentage points by 2043. The large gap is due to the Congo underperforming in a number of social indicators, such as inequality, access to WaSH infrastructure and education, and higher unemployment than its income peers.[16]



Chart 11: Energy production by type in CP, 1990–2043

Barrels of oil equivalent and % of energy production



Source: IFs 7.63 initialising from World Energy Outlook data

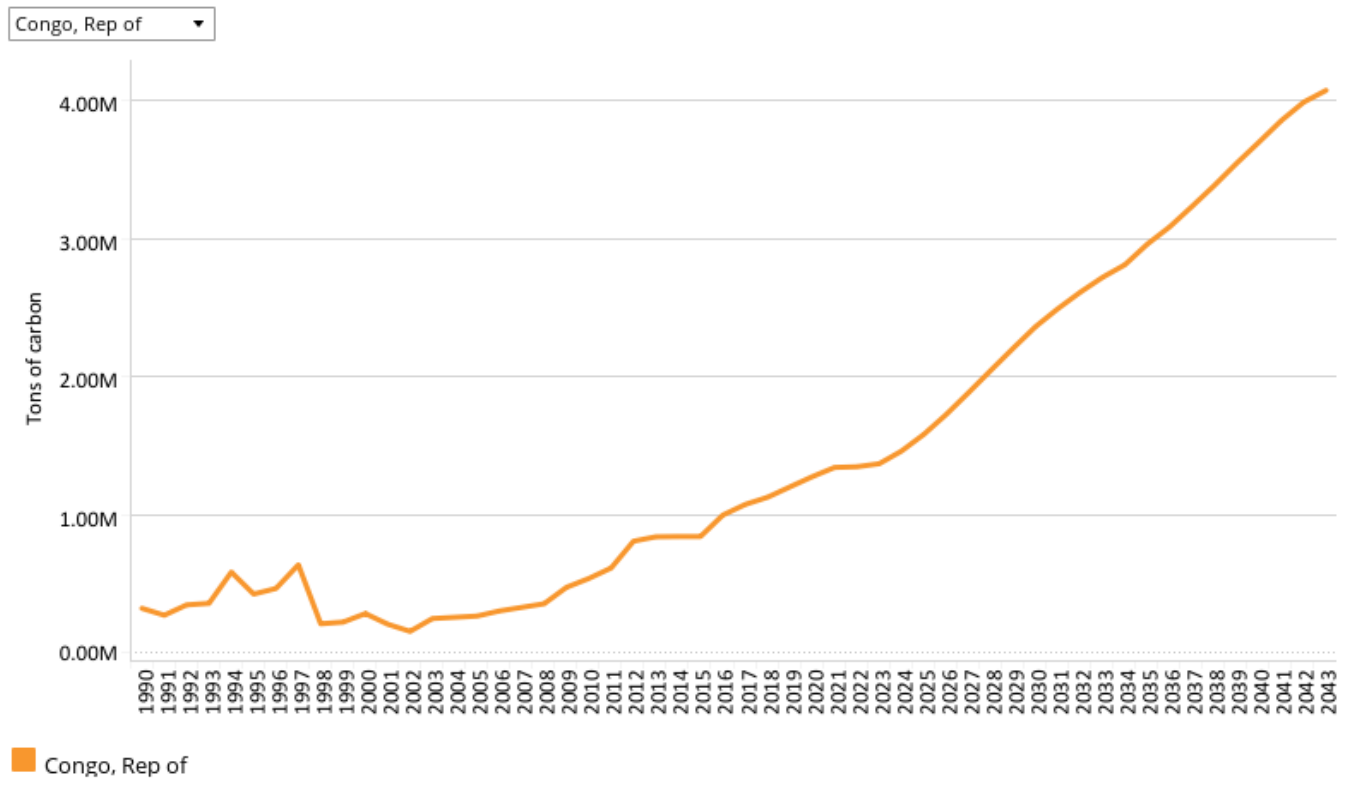
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The IFs platform forecasts six types of energy, namely oil, gas, coal, hydro, nuclear and other renewables. To allow comparisons between different types of energy, the data is converted into billion barrels of oil equivalent (BBOE). The energy contained in a barrel of oil is approximately 5.8 million British thermal units (MBTUs) or 1 700 kilowatt-hours (kWh) of energy.

The Congolese economy is heavily dependent on oil exports and the majority of its industrial sector is geared towards the extraction of oil. This is reflected in the resource's dominance of the Congo's energy production: in 2019, 97.2% of all energy produced in the country stemmed from oil. As discussed in Chart 8 , natural gas is being used more in electricity generation and its increased importance will result in gas accounting for 28.7% of energy production by 2043 in the Current Path forecast. Other renewables will also gain ground and constitute 13.7% of total energy production by 2043, a large increase given that it did not contribute at all in 2019. The economy will require increased diversification in the medium term as oil production will plateau over the forecast horizon in the Current Path forecast: by 2043, the country will produce 84 million barrels of oil, down from 105 million in 2019. However, this forecast could be turned around as oil output could increase in the near future as investments by large oil producers are predicted to resume.[17]

Chart 12: Carbon emissions in CP, 1990–2043
 Million tons of carbon (note, not CO₂ equivalent)



Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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Carbon is released in many ways, but the three most important contributors to greenhouse gases are carbon dioxide (CO₂), carbon monoxide (CO) and methane (CH₄). Since each has a different molecular weight, IFs uses carbon. Many other sites and calculations use CO₂ equivalent.

The lack of industrialisation and growth in the manufacturing sector means the Congo was a low carbon emitter from 1990 to 2019, with emissions only rising by 900 000 tons in that time. Total carbon emissions will steadily increase as the economy grows in the Current Path forecast, reaching 4.1 million tons of carbon by 2043.

The Congo will however remain a small emitter on the continent. In 2019, the country ranked 29th for emissions and will fall two places to 31st by 2043. In fact, carbon emissions in Africa are heavily skewed towards a select number of countries: in 2019, the top three emitters in Africa, South Africa, Egypt and Algeria, emitted more tons of carbon than the rest of Africa’s countries combined, and by 2043 four countries will emit more than the other 50 countries combined. Although not a large emitter, the Congo will continue to face the consequences of climate change, and the country is ill-prepared, as discussed in [Chart 1](#).

Endnotes

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Du Toit McLachlan (2024) Republic of the Congo. Published online at futures.issafrica.org. Retrieved from <https://futures.issafrica.org/geographic/countries/republic-of-the-congo/> [Online Resource] Updated 13 December 2023.



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