COMESA

COMESA Development Futures: Current Path

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COMESA: Current Path forecast

Chart 1: Political map of COMESA

This page provides an overview of the key characteristics of COMESA 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.

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The Common Market for Eastern and Southern Africa (COMESA) has 21 member states, making it the second largest regional economic community in Africa. The community has ten low-income countries: Burundi, the Democratic Republic of the Congo (DR Congo), Eritrea, Ethiopia, Madagascar, Malawi, Rwanda, Somalia, Sudan and Uganda; eight lower middle-income countries: Comoros, Djibouti, Egypt, Eswatini, Kenya, Tunisia, Zambia and Zimbabwe; two upper middle-income countries: Libya and Mauritius; and one high-income country: Seychelles.

The regional economic community (REC) was formed in December 1994, aimed at forming a larger economic and trading unit that collectively overcomes trade barriers individual states face. The REC launched a free trade area in 2000 that currently has 16 members and is aiming to evolve into a customs union in the future. The community faces a common problem for Africa's regional economic communities in that all its members form part of at least one other REC. Overlapping membership dilutes the effectiveness of COMESA in promoting intra-REC trade.

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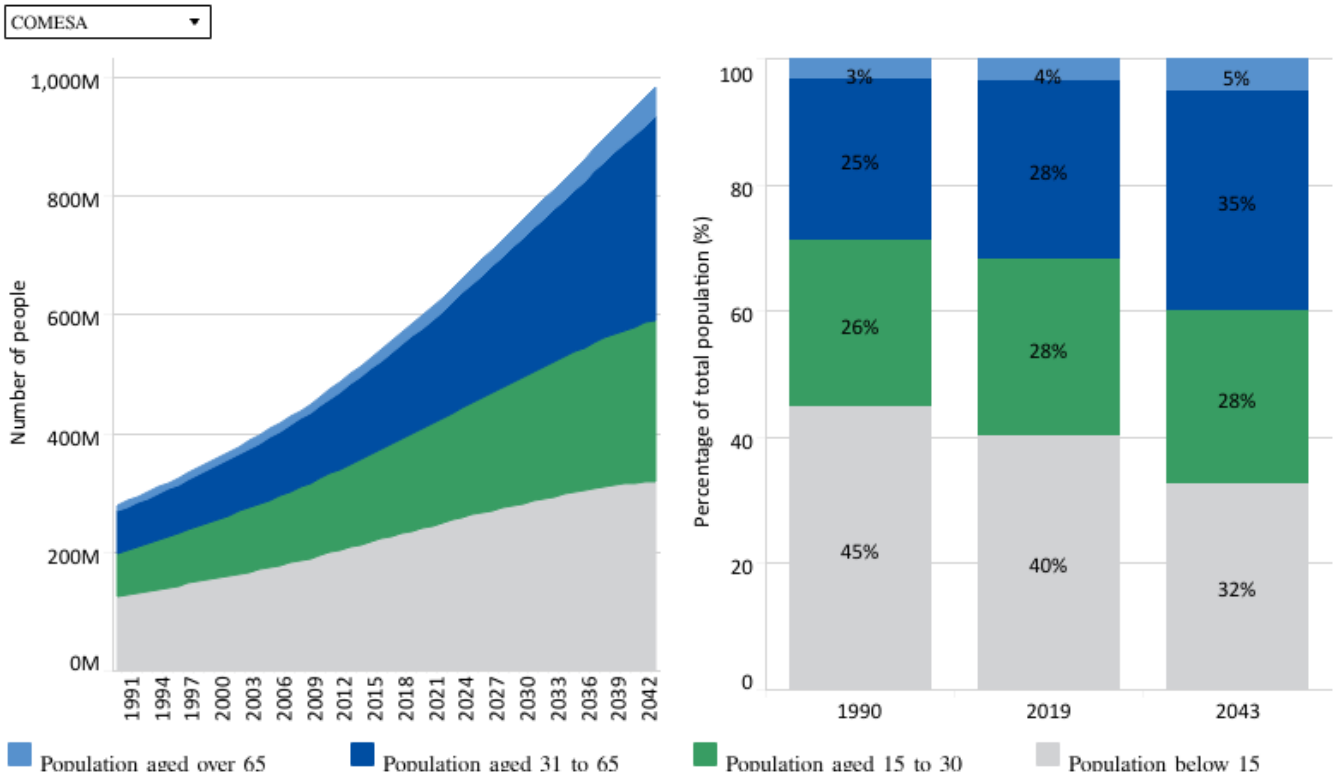
Demographics: Current Path

Chart 2: Population structure in CP, 1990–2043
By cohort and % of population



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

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COMESA's total population size was 277.2 million in 1990 and increased to 582.4 million by 2019 — a rise of 110.1%. The community is projected to continue to experience robust population growth, reaching a population size of 982.2 million people by 2043. At the country level, Ethiopia has the largest population, with 112 million people in 2019, followed by Egypt (100.5 million) and the DR Congo (86.9 million). There is a wide discrepancy between members, with the three least populous countries (Djibouti, Comoros and Seychelles) all having fewer than 1 million citizens in 2019.

The composition of COMESA's population is projected to gradually become more mature, as 62.4% of the community's inhabitants will be between the ages of 15 and 64 in 2043, 6.3 percentage points higher than 2019. The trend is positive, signalling the emergence of a demographic dividend, where the ratio of working-age persons to dependants reaches 1.7. To guard against instability, steps must be taken to ensure that the increasingly youthful population finds work and is furnished with the appropriate skills to make a productive contribution to the economy. Countries such as Libya, Eswatini, Tunisia, Sudan and Egypt, where youth unemployment was above 25% in 2019, are particularly vulnerable to increased instability due to a youth bulge.

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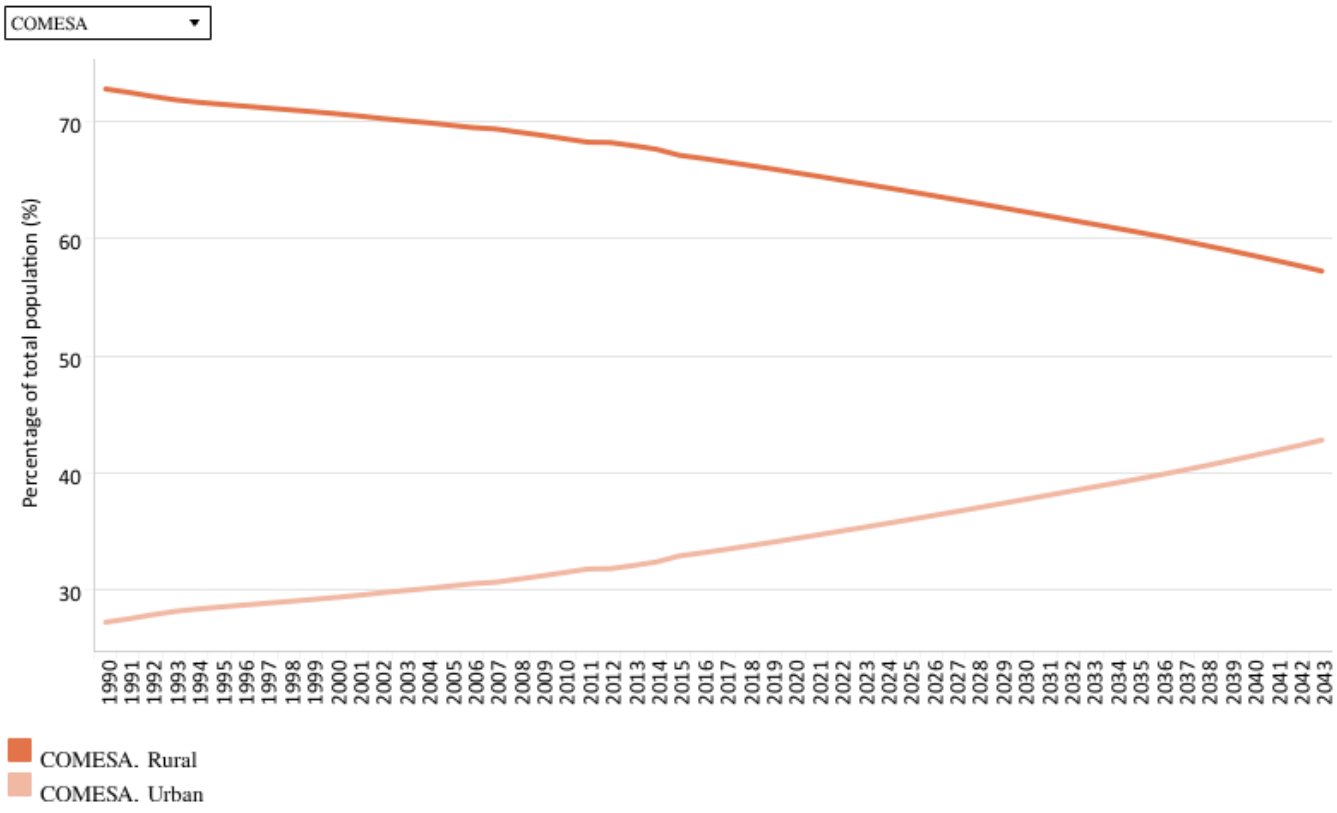
Chart 3: Urban and rural population in CP, 1990–2043
% of population



Source: IFs 7.63 initialising from UN World Urbanization Prospects estimate

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COMESA's population is predominantly rural, with only 27.2% living in urban areas in 2019. The REC is projected to steadily urbanise over the forecast horizon as the rural population reaches 57.2% of the total population in 2043 — a 15.6 percentage point decrease. There are large differences between states: Rwanda's urban population will constitute only 19.5% of the population in 2043, whereas Libya's will reach 84.3%. Madagascar and Seychelles urbanise at roughly the same rate as the REC, with rural population sizes decreasing by more than 15 percentage points. Zimbabwe is expected to be 1.3 percentage points more rural in 2043.

Chart 4: Population density map for 2019

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COMESA's population density was 0.5 persons per hectare in 2019 and is expected to increase to 0.9 by 2043. There is however a large variance between individual countries due to COMESA containing the four most densely populated countries in Africa in 2019: Mauritius, Rwanda, Comoros and Burundi. While Mauritius is projected to see a small increase, the other three countries are expected to see significant larger densities. Rwanda, Burundi and Comoros will have a population density above seven persons per hectare by 2043. The combination of high total fertility rates, especially in Burundi, and small land area explain the increases in these countries.

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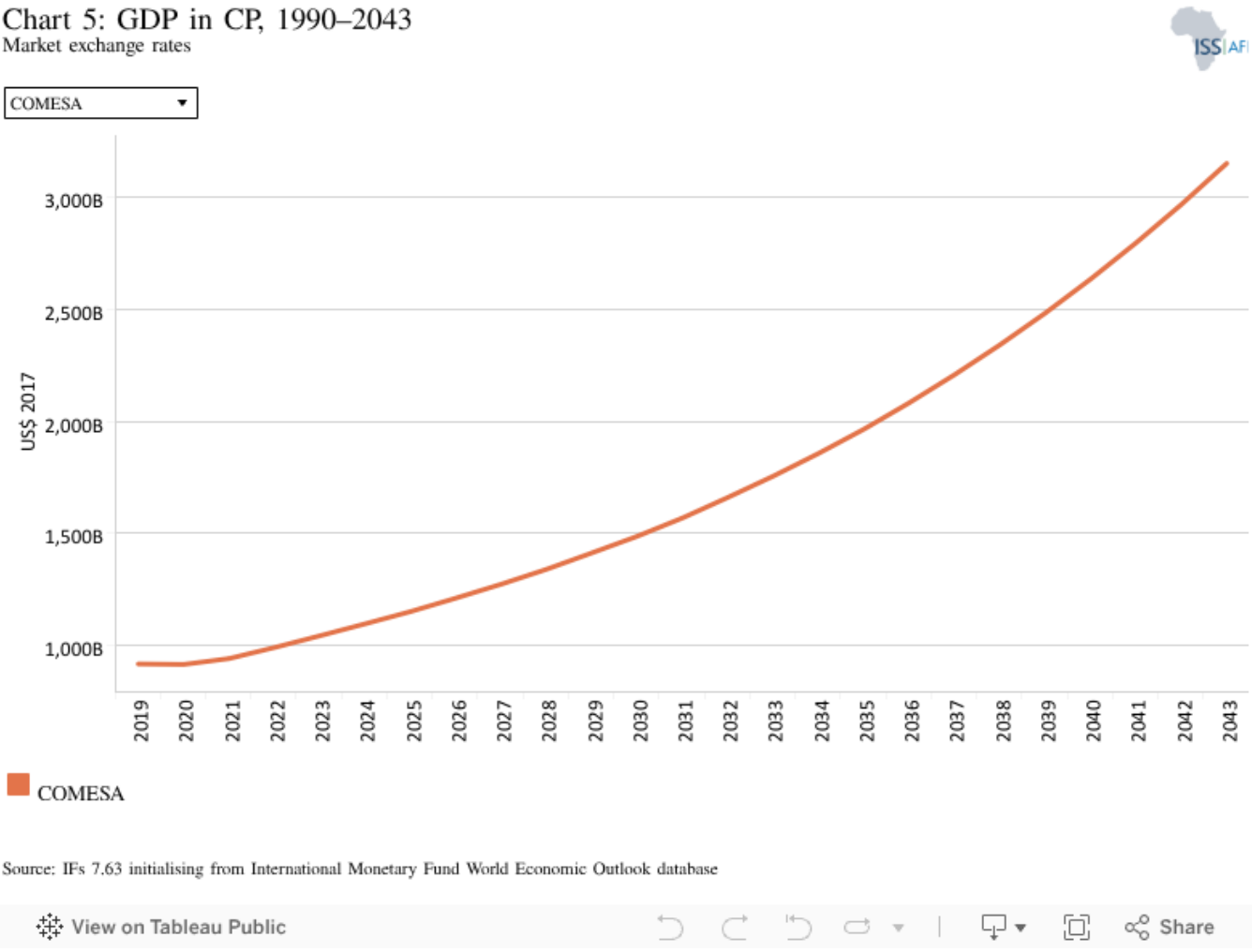
Economics: Current Path



COMESA's combined GDP reached US$918.9 billion in 2019 and is projected to increase to US$3 150.1 billion by 2043. The increase will largely be driven by robust growth in Egypt, Ethiopia, Uganda and Kenya. The largest growth is projected to occur in Ethiopia, whose economy will be seven times bigger at US$588.6 billion in 2043 compared to 2019.

Growth of this magnitude will bring the size of the Ethiopian economy closer to the largest economy in COMESA, Egypt, but the North African country is expected to continue its dominance of COMESA. In 2019, the Egyptian economy accounted for 38% of COMESA's combined GDP, with Ethiopia second on 7.7%. In the Current Path forecast, this dynamic is expected to shift significantly, with Ethiopia's economy accounting for 18.7% of combined GDP in 2043, while Egypt will see a 6.8 percentage point decline to 31.2%.

At the other end of the spectrum, 14 countries are projected to contribute less than 5% to COMESA's combined GDP by 2043. These smaller economies are all projected to experience robust growth however, with Malawi in particular seeing a 576% rise from 2019. Tunisia, Mauritius and Seychelles will all experience an increase under 100%, but Mauritius and Seychelles have a small population compared to Tunisia. Tunisia's slower growth means it will see a 3.4 percentage point decrease in its contribution to COMESA's combined GDP by 2043.

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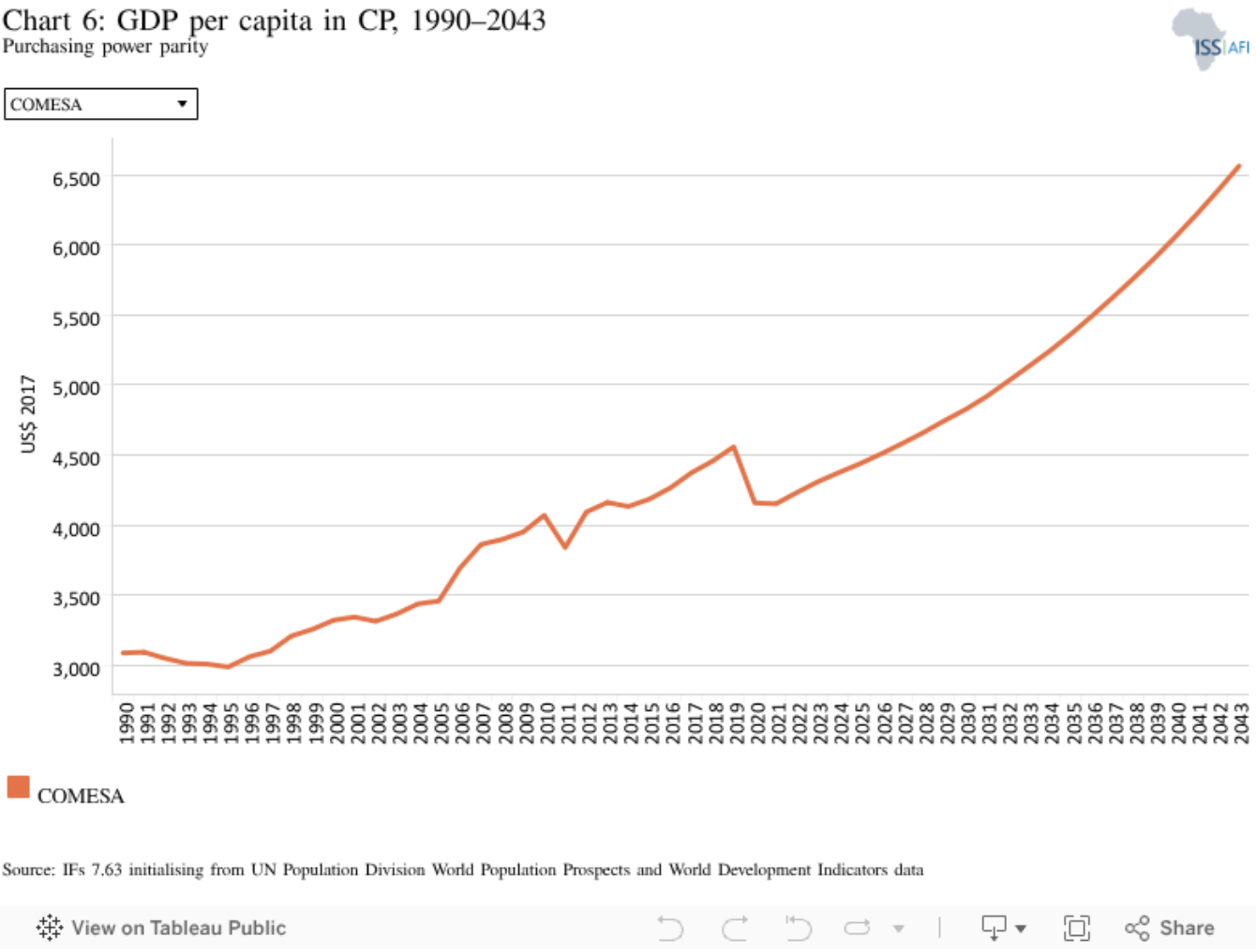
Chart 6: GDP per capita in CP, 1990–2043
Purchasing power parity



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 COMESA.

There was steady growth of COMESA's GDP per capita from 1990 to 2019, as it rose by 48% in that time. The REC is projected to continue along this upward trajectory, reaching US$6 563 per person by 2043. The average for Africa as a whole would still be higher however, standing at US$7 157 by 2043 in the Current Path forecast.

Considerable divergences exist within COMESA's membership: Seychelles is expected to see its GDP per capita rise to US$33 409 by 2043, while Burundi's is projected to only reach US$1 297 in that same year. In total, 16 out 21 members are projected to be below Africa's average GDP per capita by 2043.

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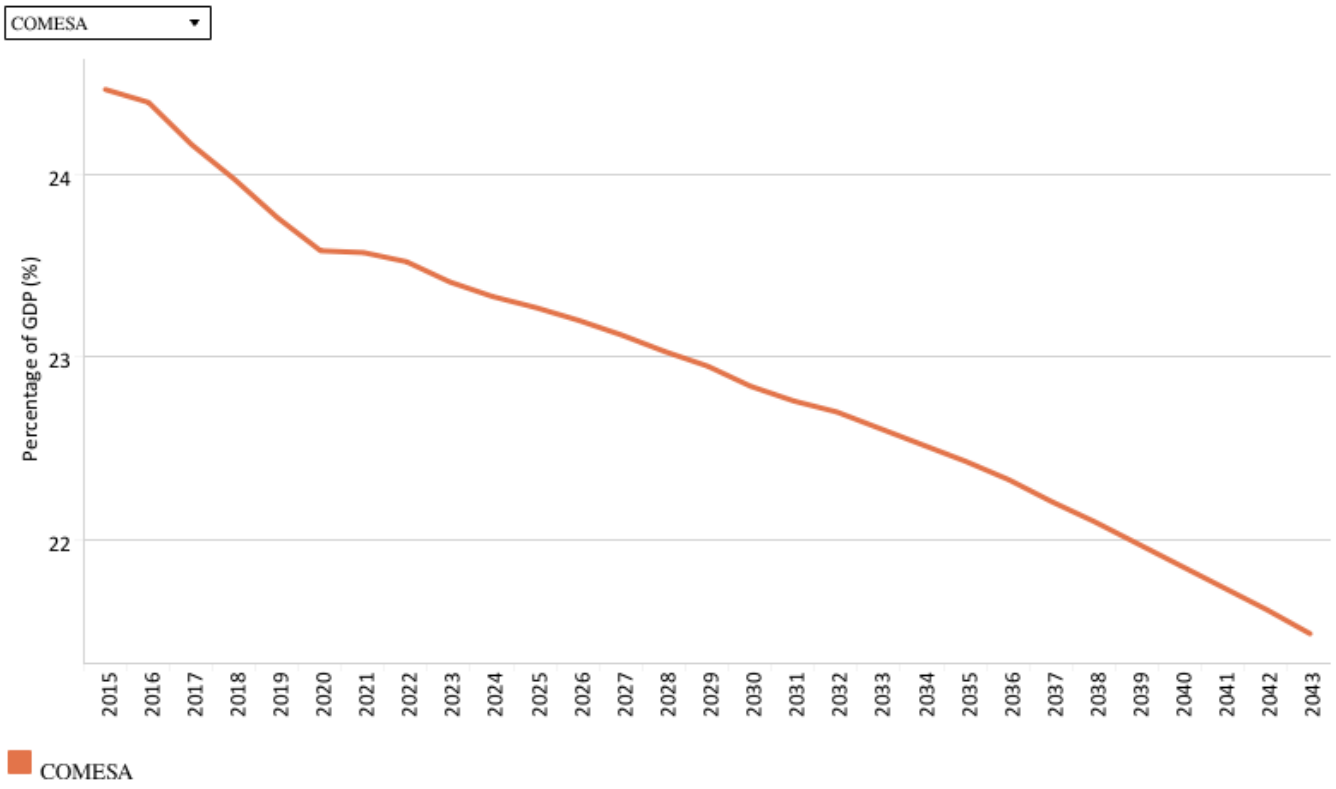
Chart 7: Informal sector value in CP, 2015–2043
% of GDP



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 value of COMESA's informal sector was below the average for Africa in 2019 and is expected to gradually decrease in value over the forecast horizon, falling from 23.8% of GDP in 2019 to 21.5% in 2043.

Zimbabwe is the individual country projected to see the largest reduction, of 21.7 percentage points, over the forecast horizon, while Madagascar's decrease of 0.9 percentage points would be the smallest. Notably, Madagascar would lose ground on its fellow COMESA members and go from having the 11th biggest informal sector by value as a per cent of GDP to 7th by 2043. Mauritius' decrease of 4.7 percentage points would push the value of the informal sector below 4% and confer added benefits of increasing formality and productivity in the country.

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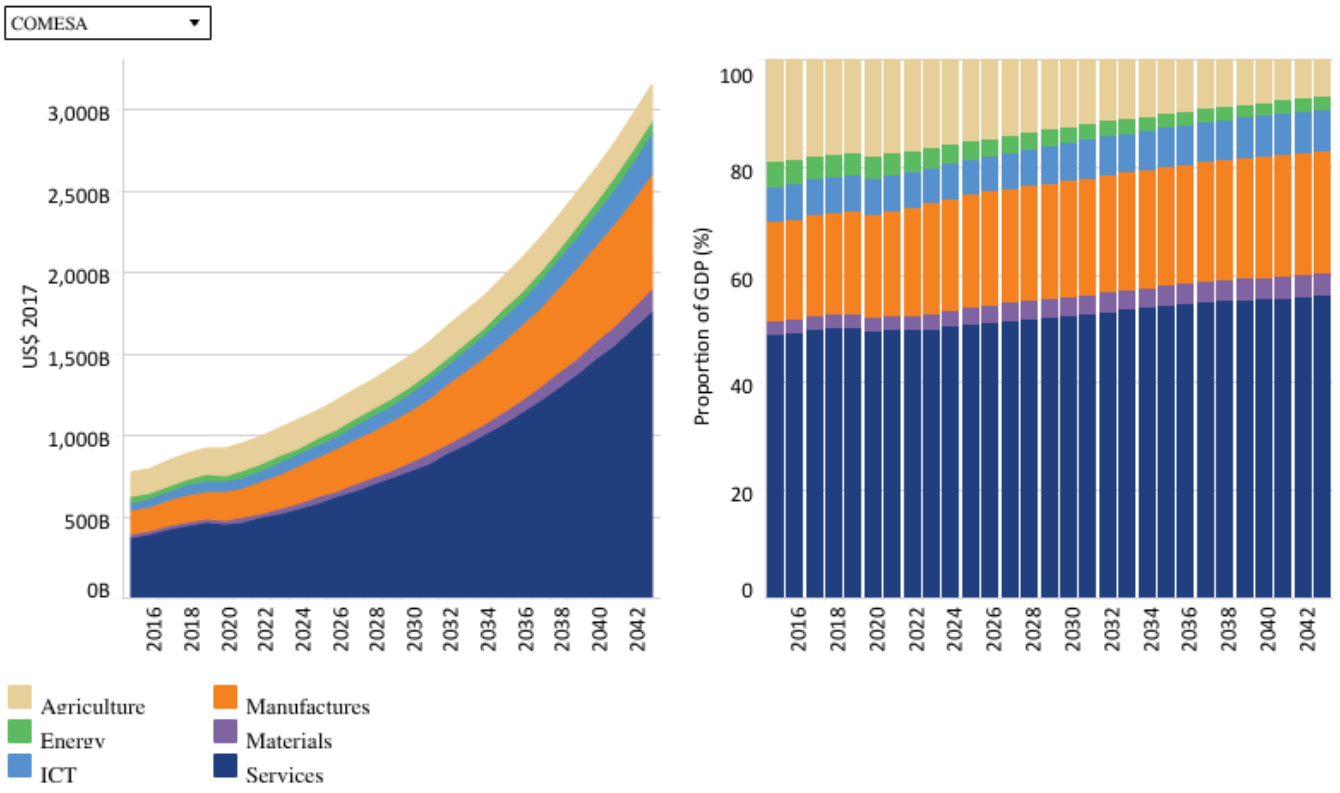
Chart 8: Value added by sector in CP, 2015–2043
Billions US$ 2017 and % of GDP



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), manufactures, services and information and communications technology (ICT). Most other sources use a threefold distinction between only agriculture, industry and services with the result that data may differ.

The value added by each sector as per cent of total value added highlights the importance of services for COMESA. The sector added 50.1% of all value added in 2019, equating to US$459.8 billion, and is expected to grow to 56% by 2043. ICT and materials are projected to marginally expand across the forecast horizon, while agriculture would decrease by 10.5 percentage points. Manufactures is expected to grow steadily, reaching 22.6% in 2043.

Reflecting the overall trend for the RECs, all individual economies are projected to see a decline in the value agriculture adds. Ethiopia is expected to see the largest fall, equating to 26 percentage points in 2043. The manufacturing sector would also grow in all but one of the RECs economies, namely Mauritius, with Eritrea and Malawi potentially seeing increases over 10 percentage points. Services would however continue to dominate; in 18 countries services would contribute 50% or more of all value added in the economy, and in four this figure is above 70%.

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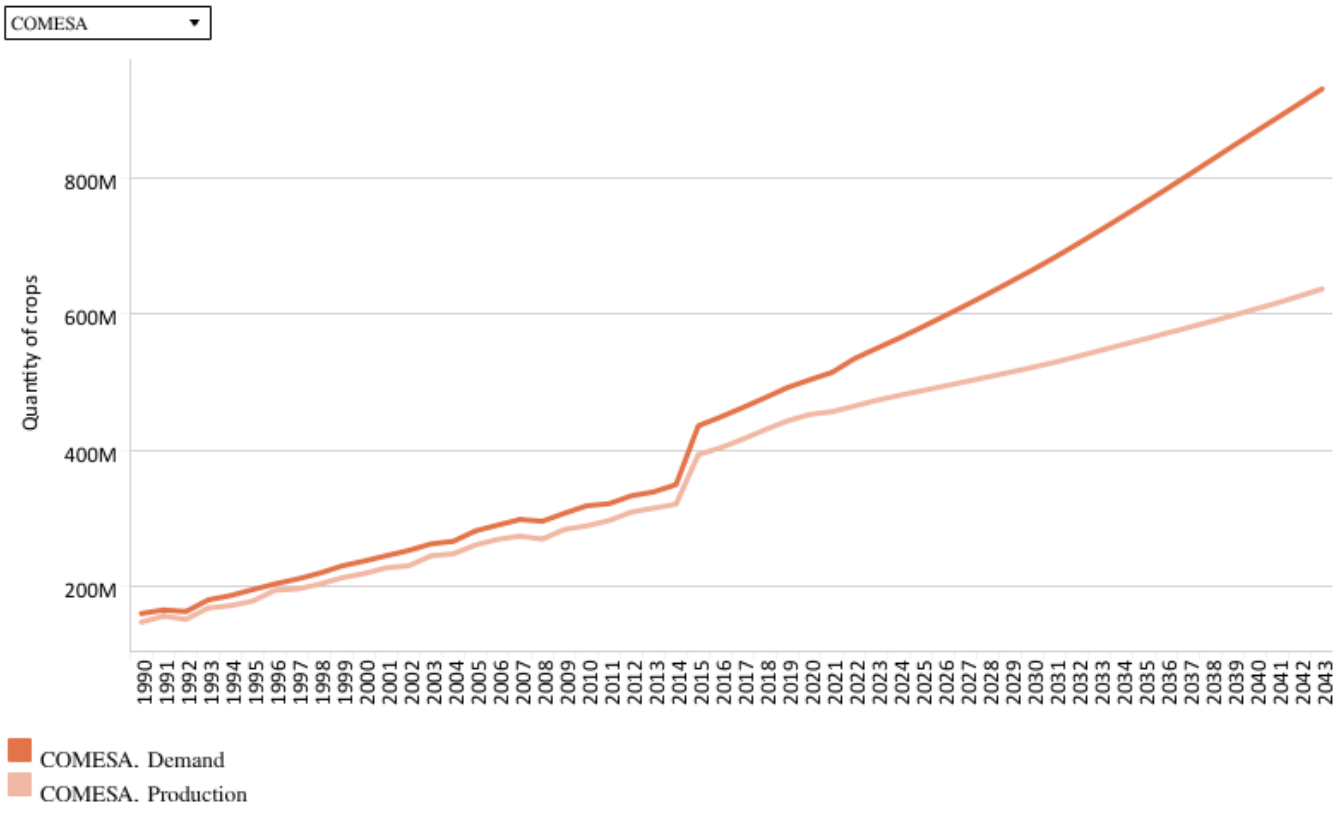
Chart 9: Agriculture production/demand in CP, 1990–2043
Crops million tons



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 projected trajectory for COMESA's agricultural production and demand along the Current Path forecast shows a situation of increased divergence, with a shortfall of 59 million metric tons in 2019 growing to 294.1 million metric tons in 2043. This growing gap mirrors the likely trajectory for Africa as a whole.

A projected increase of 68.6% in population size in that time helps explain the growing gap as demand is set to grow quickly over the forecast horizon and place added pressure on domestic production. To meet this demand, food imports will have to increase, making the REC more food insecure and more susceptible to changes in international food prices as a whole.

Most member countries are expected to see a significant increase in the size of their agriculture production shortfall. Egypt and the DR Congo are projected to have the largest gaps by 2043: their shortfalls exceeding 50 million metric tons in 2043. The only country expected to see a decrease in the size of their shortfall is Libya, whose gap between production and demand is projected to decrease by 21%.

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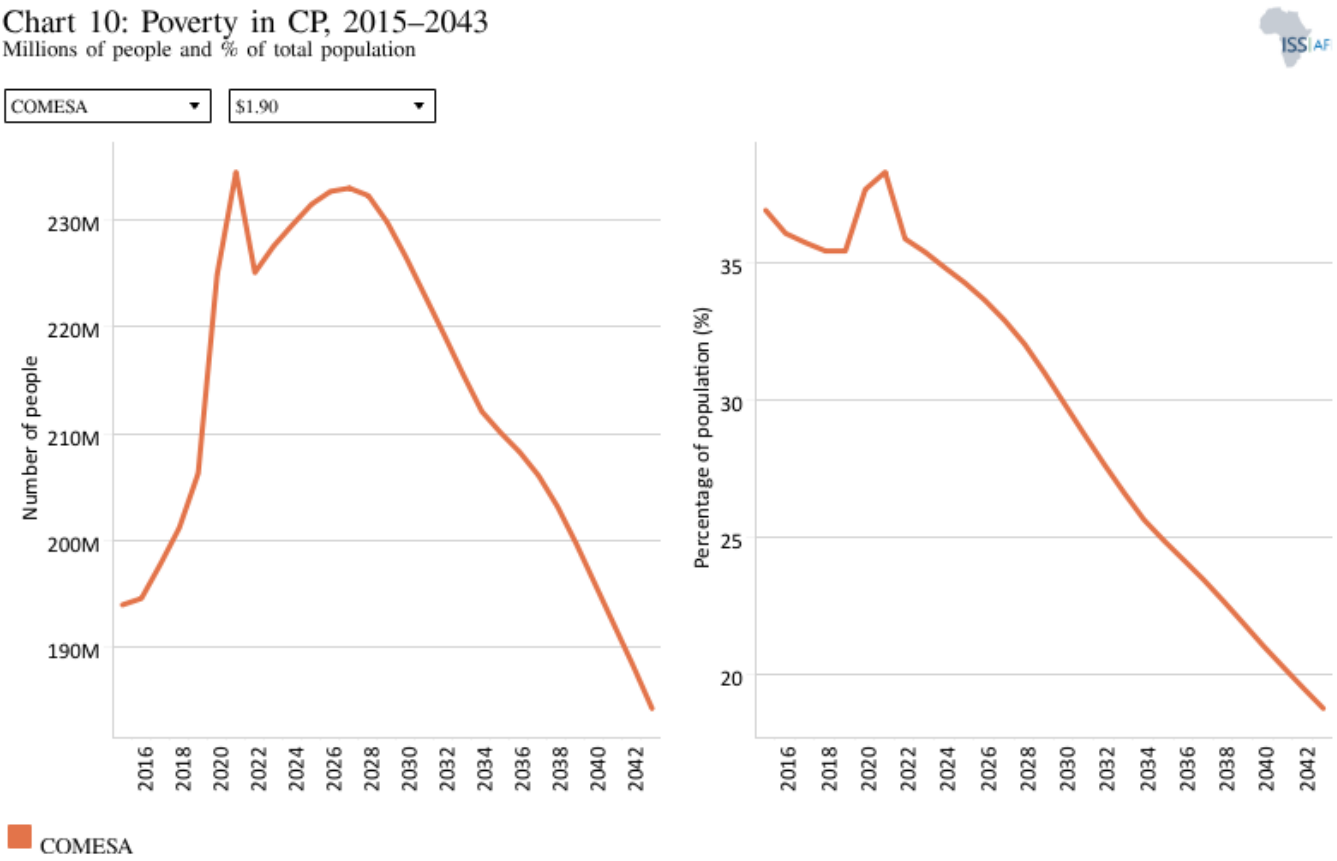
Poverty: Current Path



There are numerous methodologies 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 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.

COMESA is projected to make progress in reducing the amount of extremely poor people in the community and have a steady decline in the percentage of the population classed as extremely poor. In 2019, at the poverty level of $1.90 per day, 35.4% of the population was deemed extremely poor; by 2043, this figure would have dropped to 18.8%. This equates to a reduction of 22 million people — a positive outcome considering the REC's total population is projected to grow by 399.8 million people in that time. Still, by 2043, 184.3 million people would still be classified as extremely poor at the $1.90 poverty line.

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COMESA has countries in each of the four World Bank income groups. At the $1.90 level, the REC is projected to see good progress, with Malawi, Rwanda and Somalia expected to see percentage point decreases of 51.4, 32.5 and 28.6 respectively by 2043. Madagascar's progress is projected to be muted however, with only a 6.6 percentage point drop to 66.6% by 2043. At the $3.20 per day level, Djibouti, Kenya and Zimbabwe are expected to see reductions above 20 percentage points by 2043, while Zambia would struggle with a decrease of only 7.1 percentage points and poverty of 67.3% in 2043. At the $5.50 per day poverty line, Libya and Mauritius would both have a poverty rate below 5% in 2043 in the Current Path forecast, while Seychelles, as a high-income country, will continue to struggle at the high poverty line of $22.70, with a poverty rate of 49.7%.

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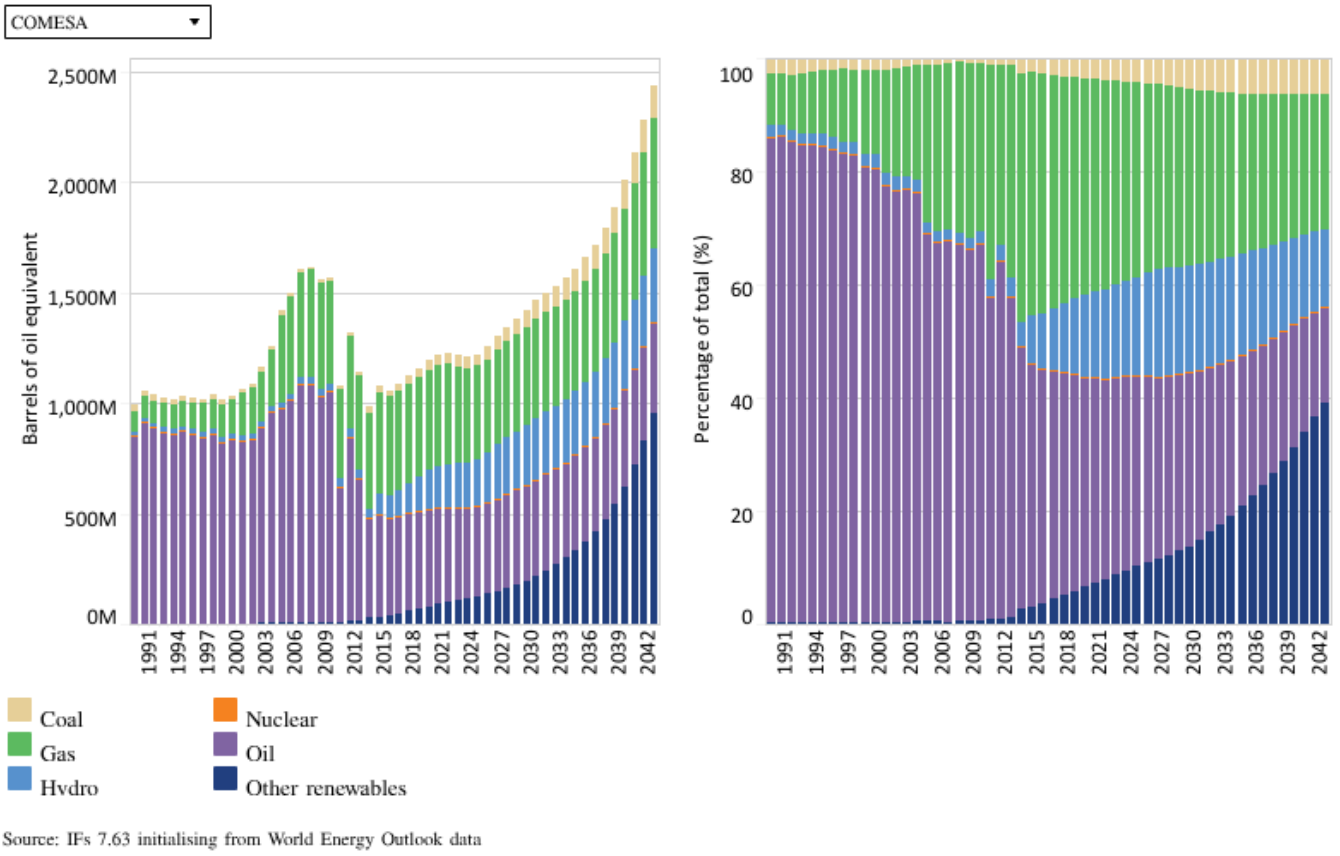
Carbon Emissions/Energy: Current Path

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.

COMESA predominantly relies on gas and oil for its energy production, with hydro playing a smaller part (Chart 11). This is projected to change, and by 2043 other renewables, excluding hydro power, would constitute the largest share of energy production at 39.2%, followed by gas at 24.1% and oil at 16.8%. Combined with hydro, renewable energy production would amount to 52.7% of the total energy produced, a positive step towards a more environmentally friendly future.

Individually, the projected paths for COMESA's members vary but an overall shift towards renewables is still discernible. For example, Burundi is projected to experience a substantial reconfiguration. The country primarily produced energy from gas in 2019 — the resource accounting for 86.1% of total energy produced. By 2043, however, other renewables are projected to account for 66.7% of energy production and gas only 17.8%. In total, by 2043, 14 of the 21 members would have other renewables or hydro as their primary source of energy production, a sizable jump from 5 out of 21 in 2019.

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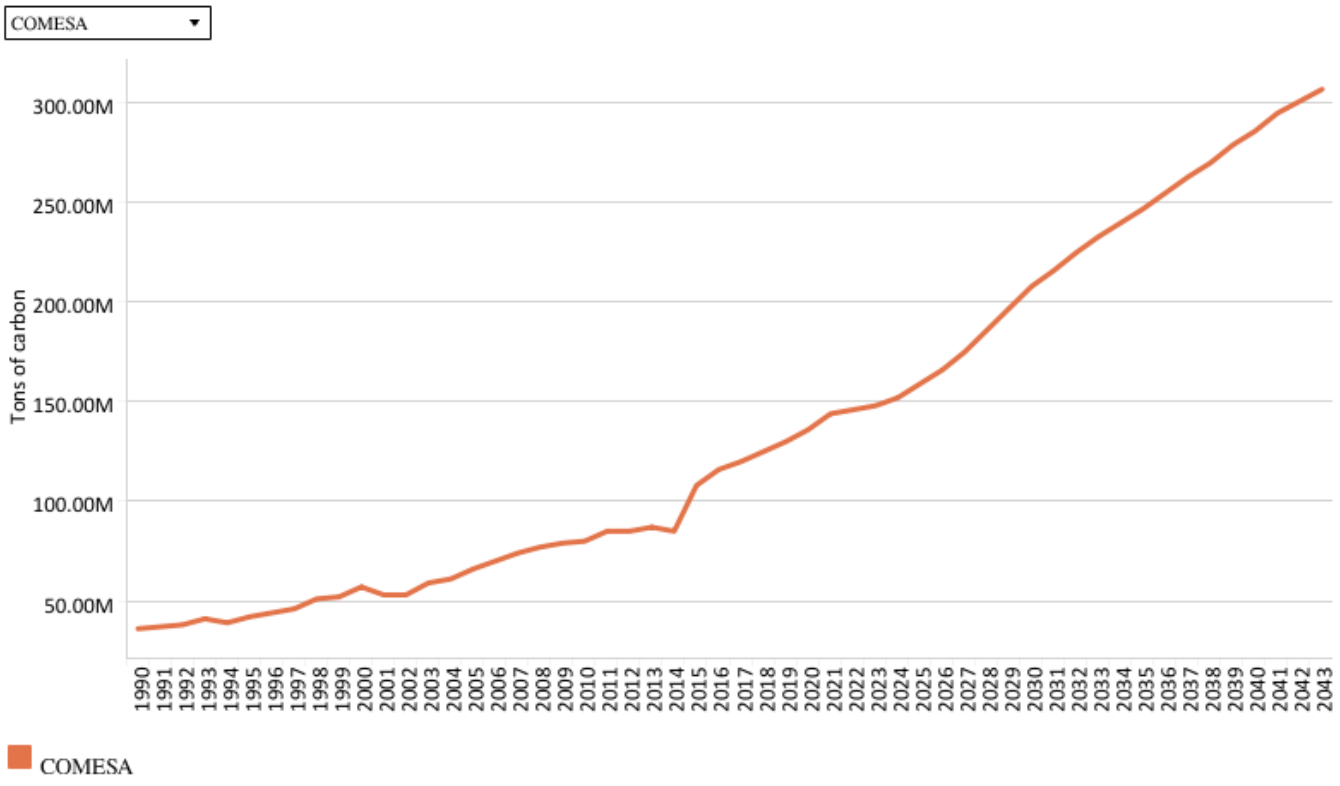
Chart 12: Carbon emissions in CP, 1990–2043

Million tons of carbon (note, not CO_2 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 (CO_2), carbon monoxide (CO) and methane (CH_4). Since each has a different molecular weight, IFs uses carbon. Many other sites and calculations use CO_2 equivalent.

COMESA's carbon emissions are projected to increase from 130 million tons in 2019 to 307 million tons in 2043, an increase of 136.2% — slightly above Africa's of 122.5%. The REC contributed 30.8% of the continent's emissions in 2019, a figure expected to rise to 32.7% by 2043 in the Current Path forecast. Increasing emissions are a consequence of COMESA's expanding economies, shown in Chart 5.

The COMESA member state with the largest total emissions is Egypt, which accounted for 51.9% of emissions in 2019 and will account for 48.9% in 2043. Egypt also ranked second in Africa in 2019 for most carbon emissions behind South Africa and is projected to still be in that position by 2043.

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Mr Du Toit McLachlan joined the ISS in February 2021. He holds an honour's degree in international relations from the University of Pretoria and is the AFI website manager. Du Toit works extensively on data analytics, visualisation and chart design to strengthen the accessibility of AFI research. His research interests include gender equality, international trade, and international geopolitics.

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