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ECCAS

ECCAS: Current Path

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ECCAS: Current Path forecast

Chart 1: Political map of ECCAS

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

ECCAS has 11 member states (see Chart 1), namely Angola, Burundi, Cameroon, the Central African Republic (CAR), Chad,

the Democratic Republic of the Congo (DR Congo), the Republic of the Congo, Equatorial Guinea, Gabon, Rwanda and São Tomé and Príncipe. The Community was established on 18 October 1983 by members of the Central African Customs and Economic Union (UDEAC) and the Economic Community of the Great Lakes States (CEPGL), as well as São Tomé and Príncipe. Angola remained an observer until 1999 when it became a full member. Rwanda withdrew in 2007 and rejoined in 2013.

ECCAS was inactive for several years because of the non-payment of membership fees and the conflict in the Great Lakes region, with Rwanda on the opposite side to Angola.

The Community is one of the eight regional economic communities (RECs) recognised by the African Union but generally suffers from low levels of regional integration and limited coordination. A number of ECCAS member states also belong to other RECs.

The World Bank classifies Gabon and Equatorial Guinea as nominally upper middle-income countries, but the extreme levels of poor governance and corruption mean that these categorisations do not reflect reality of the majority of their populations. Within IFs, the upper middle-income classification of these two countries means that our forecasts for them may be unreliable. Angola, Cameroon, the Republic of the Congo and São Tomé and Príncipe are all considered lower middle-income countries. The ECCAS countries classified as low-income are Burundi, CAR, Chad, the DR Congo and Rwanda.
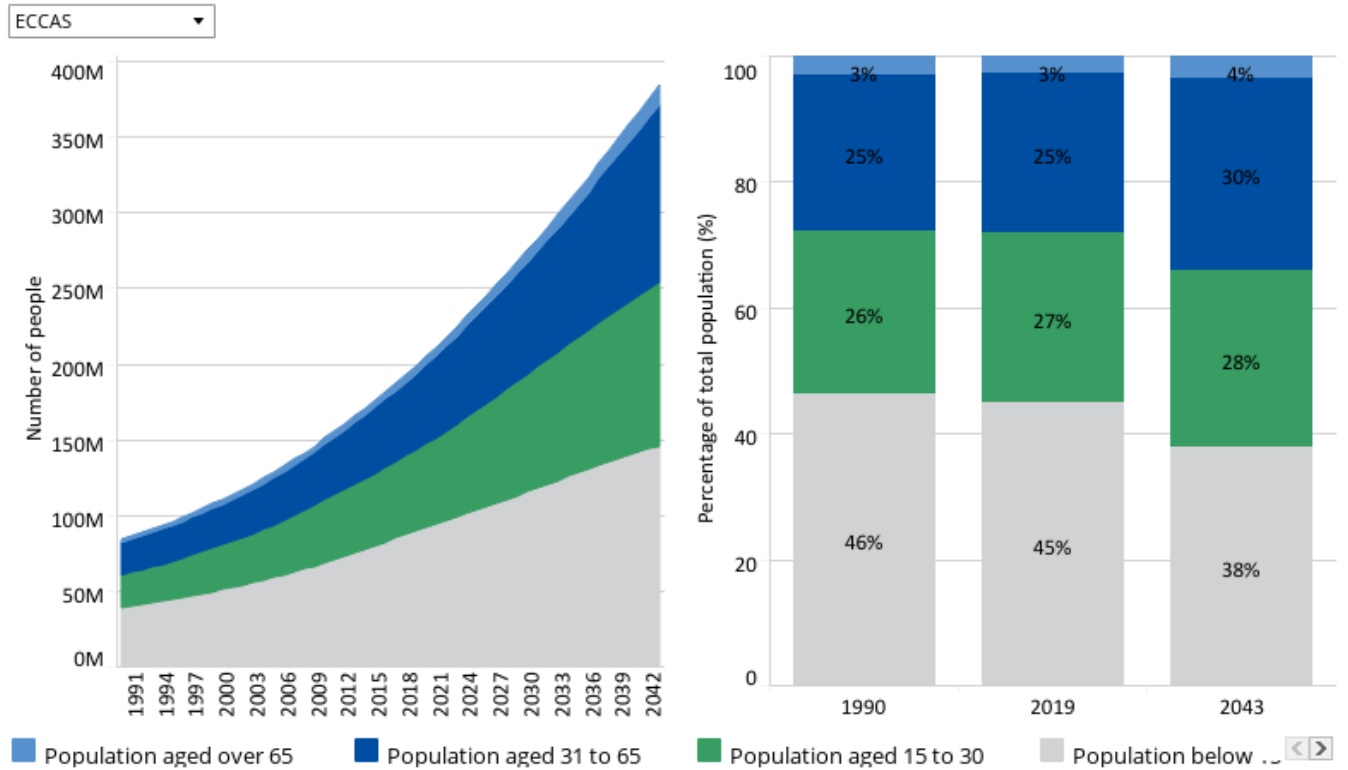
Chart 2: Population structure in CP, 1990–2043
By cohort and % of population

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Legend: Population aged over 65 · Population aged 31 to 65 · Population aged 15 to 30 · Population below ..

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

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Chart 2A displays that the total population of ECCAS has increased from 83.6 million people in 1990 to 199 million in 2019 and is expected to increase to 384 million by 2043. Whereas the average population growth rate for the Community was high at 3.1% in 2019, it will modestly decline to 2.4% by 2043. The DR Congo is the most populous member state with 87 million people in 2019, followed by Angola (32 million people), Cameroon (26 million), Chad (16.3 million), Rwanda (12.6 million), Burundi (11.1 million), Republic of the Congo (5.3 million), CAR (4.8 million), Gabon (2.2 million), Equatorial Guinea (1.3 million) and São Tomé and Príncipe (218 000).

Average 2019 fertility rates in the DR Congo (at 5.9 children) and Rwanda (at 3.9 children) are coming down more rapidly than for other countries in the Community. The countries with the highest fertility rates across the forecast horizon are Chad and Angola. By 2043, these countries would still have total fertility rates of 4.4 and 4.3 children per fertile woman respectively.

In 2019, the median age for the Community ranged from 22.4 years in Gabon to 16.6 years in Angola. ECCAS, therefore, has an exceptionally young population with 49% of its adult population in the age group 15 to 29 years of age in 2019, typically considered as constituting its youth bulge (Chart 2B). Even by 2043, 45% of its adult population will still be in this bulge, implying considerable momentum towards social turbulence without very rapid expansion of services and

opportunities. Because only 52.4% of its population was in the general working-age bracket (15 to 64 years of age) in 2019, ECCAS will likely only benefit from a demographic dividend during the second half of the century, as long as governments provide appropriate education, jobs and healthcare.

At 62.6 years, the 2019 average life expectancy for the ECCAS group is significantly lower than the African average at 65.8 years. Average ECCAS life expectancy will increase to 69.2 years in 2043 with the gap between males and females expected to increase from 2.7 to 3.5 years.

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

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■ ECCAS. Rural   ■ ECCAS. Urban
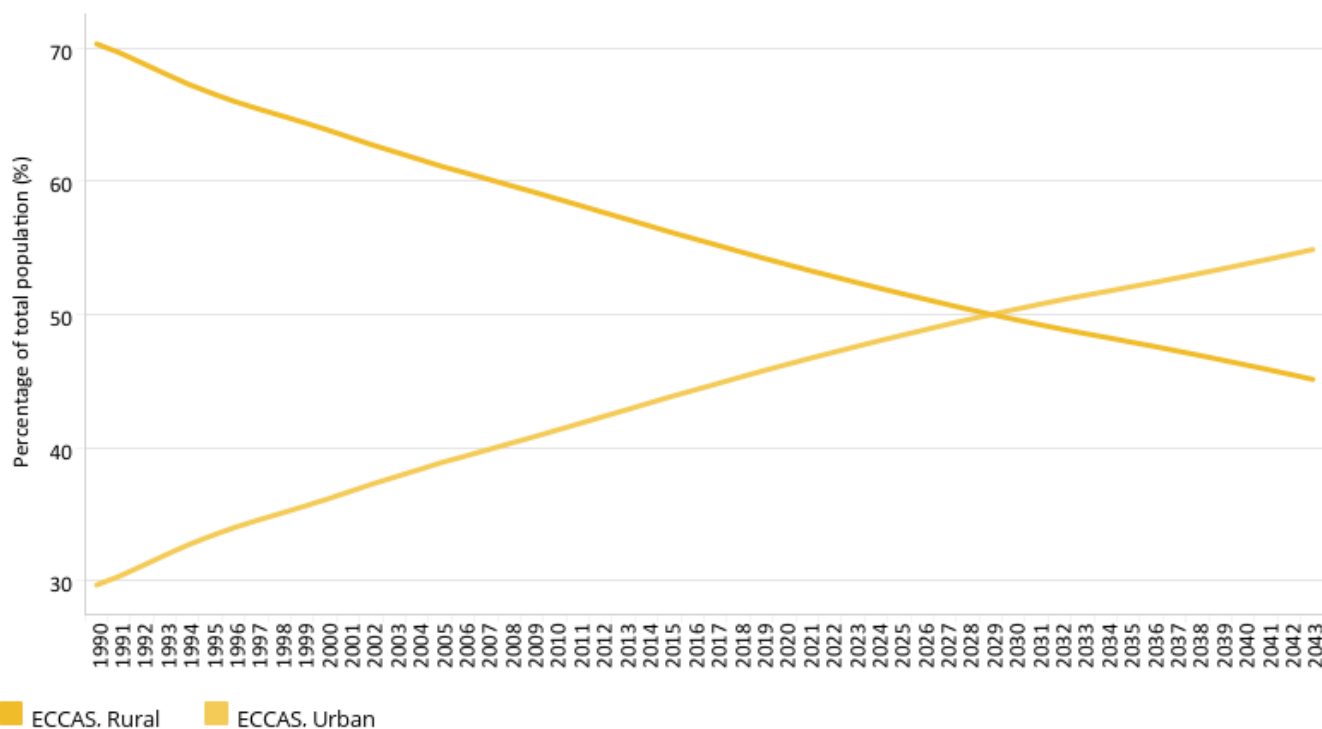
Source: IFs 7.63 initialising from UN World Urbanization Prospects estimate

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ECCAS is still predominantly rural (average of 54% in 2019) but rates differ enormously between member states. In 2019, around 92% of Gabon's population was classified as urban, while only 13% in Burundi. Even by 2043, only 20% of the population of Burundi will be considered urban. On average, the Community will become predominantly urban in 2030 and will continue to experience urbanisation but at a slower rate compared to other RECs. By 2043, 211 million people (55%) will be living in urban areas compared to 173 million in rural areas.

Chart 4: Population density map for 2019
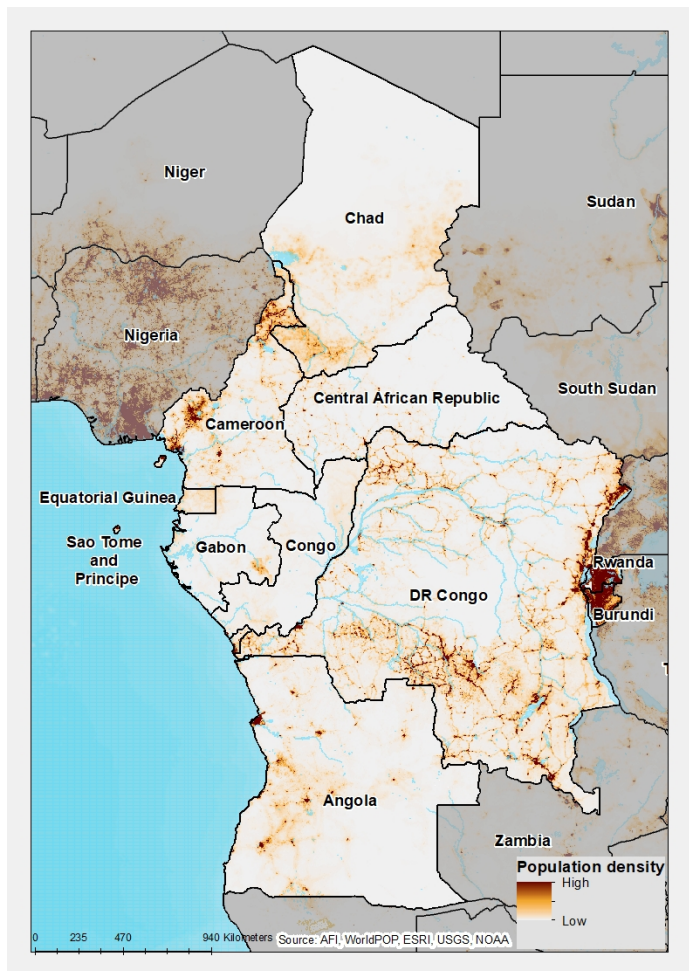
Compared to most other RECs, such as the East African Community (EAC) and the Economic Community of West African States (ECOWAS), ECCAS has relatively low average population density, but there are large differences between countries, as can be seen in Chart 4. Rwanda and Burundi are the most densely populated countries within ECCAS with more than five and four people per hectare respectively, followed by São Tomé and Príncipe which has just over two. Gabon and CAR have very low densities with less than one person per hectare. Around 2029, Rwanda will overtake Mauritius to have the most people per hectare in Africa, followed by Burundi. The two countries will, by 2043, have the highest population densities in Africa, while Gabon and CAR will remain amongst the least densely populated.
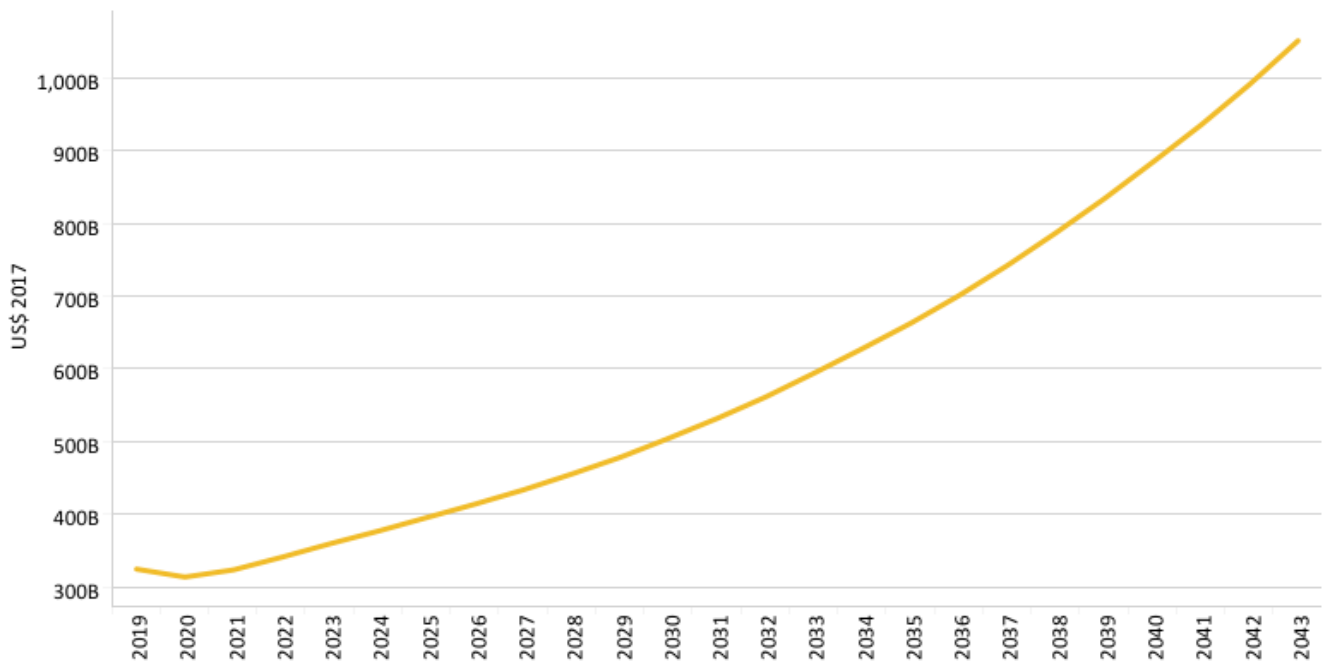
Chart 5: GDP in CP, 1990–2043
Market exchange rates

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

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The combined GDP of ECCAS has nearly tripled from US$126.4 billion in 1990 to US$324.9 billion in 2019. It is expected to expand to US$1 050.8 billion by 2043. In 2019, ECCAS constituted 11% of Africa's economy. By 2043 it will constitute 12%, much of that due to rapid growth in Angola and to a lesser extent in the DR Congo as population numbers in these youthful countries translate into larger economies.

The ECCAS group is dominated by Angola, constituting around 43% of the GDP of the Community, followed by the DR Congo and Cameroon at 14–15% each. The share of the DR Congo is likely to modestly increase from 14% in 2019 to 17% of ECCAS. The next group of countries, Gabon, Equatorial Guinea, Republic of the Congo and Chad, constitute around 4–6% each of the ECCAS economy. The economies of Burundi, CAR and São Tomé and Príncipe are small. Each constitutes less than 1% of the ECCAS economy.

Angola had the largest economy in ECCAS in 2019, at US$138.8 billion, followed by Cameroon (US$46.3 billion) and the DR Congo (US$44.9 billion). By 2043 the economy of Angola is set to increase to a total size of US$443.3 billion, followed by the DR Congo at US$182.8 billion and Cameroon at US$141.2 billion.

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

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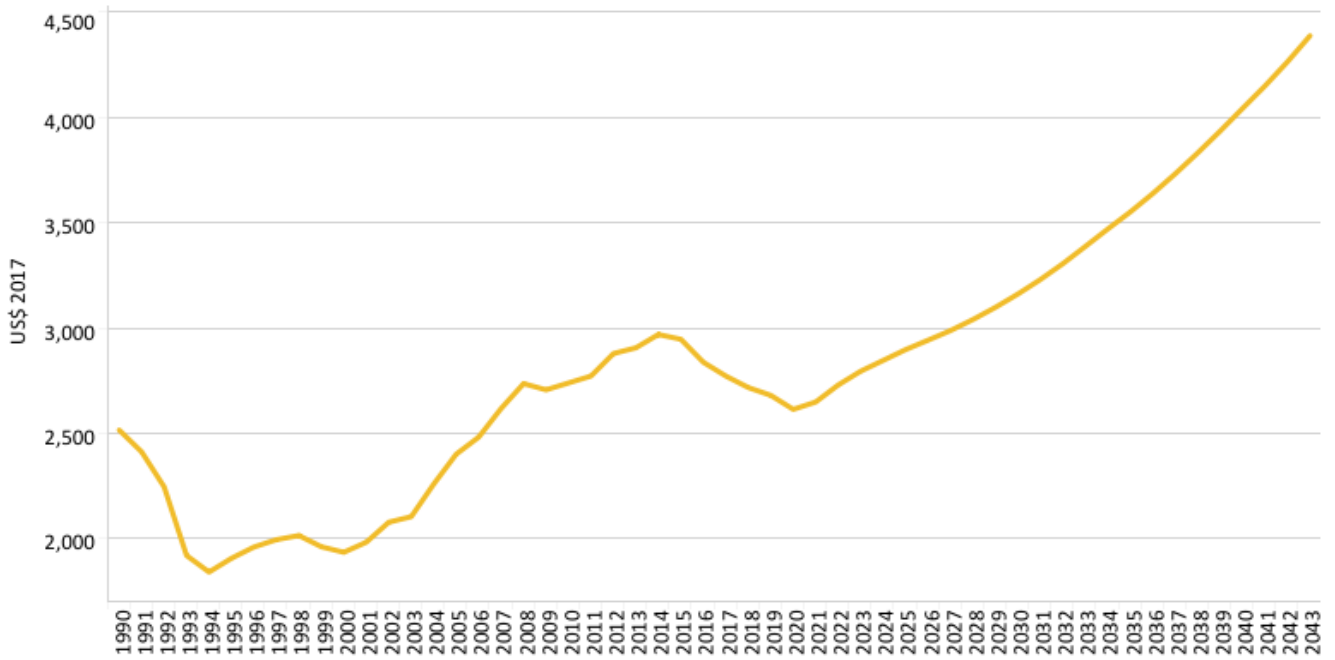
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Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

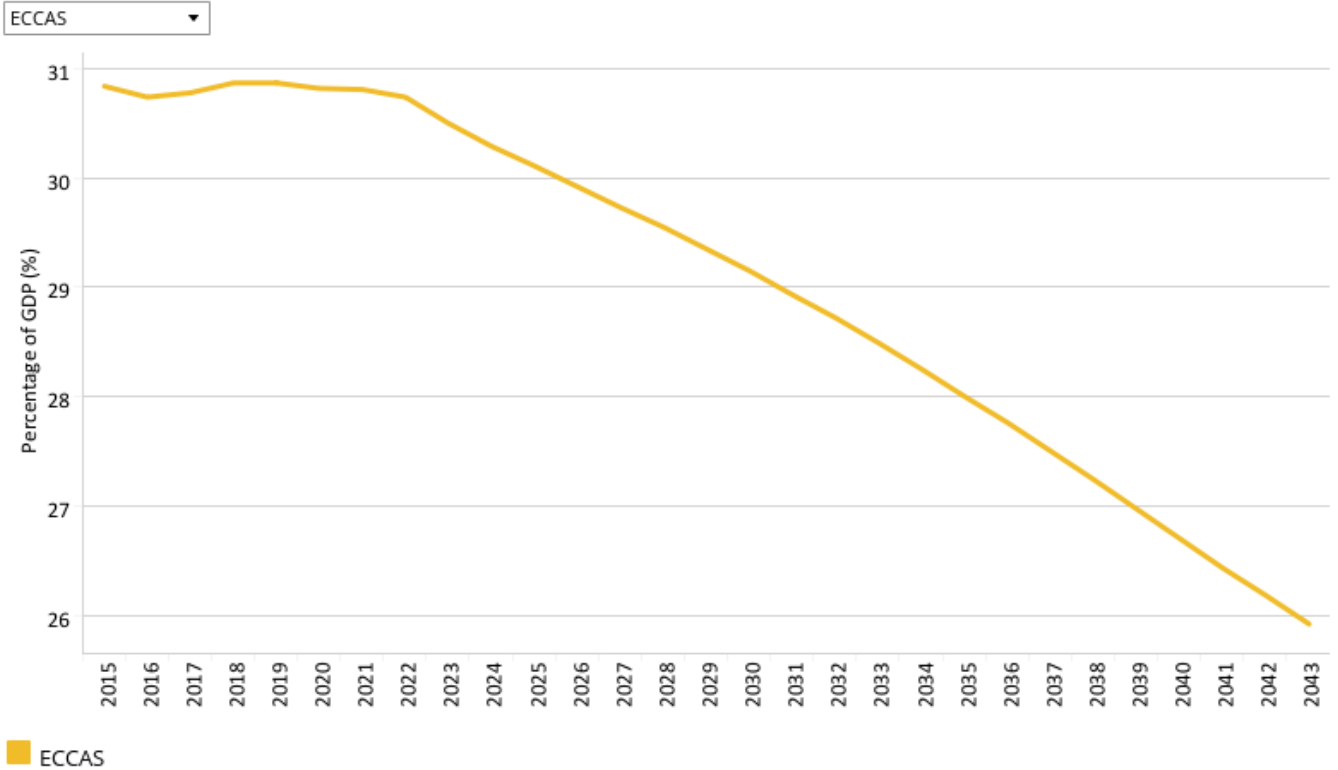⊹ View on Tableau Public   ↺ ↻ ↶ ↷ ▾ | ⬇▾ ⛶ ⟨ Share

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 ECCAS.

The average GDP per capita for ECCAS was only 54% that of Africa in 2019, reflecting the Community's general poverty and low levels of development. Because of their large oil reserves and small populations, the GDP per capita for Equatorial Guinea and Gabon exceed that of other countries in the Community by a large margin, as seen in Chart 6. In 2019, the GDP per capita for Equatorial Guineas was US$20 056 and for Gabon US$17 440, compared to an average for the DR Congo, CAR and Burundi of each below US$1 000. Based on these revenues, the World Bank classifies Equatorial Guinea and Gabon as upper middle-income but the associated data for these two countries needs to be treated with care. Much of their population lives in extreme poverty with large disparities in income between a small elite and the general population.

In 2019, the GDP per capita for Angola was only a third of that of Gabon. And the average for the latter is around US$3 000 below that of Equatorial Guinea. Countries with oil and gas production all do better compared to those without. However, these countries are heavily affected by changes in the global oil price, while the associated overvaluation of their currencies makes it very difficult to diversify their economies. The GDP per capita of Equatorial Guinea has, for example, halved the past decade.

In 2019, ECCAS member state Burundi had the lowest GDP per capita in Africa followed by another member state, CAR, lower even than the estimates for Somalia. The DR Congo and Niger are the countries with the fourth and fifth lowest average GDP per capita in Africa.

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

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

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Estimates on the contribution of the informal sector to GDP in 2019 range from 42% in the DR Congo to 15% in Equatorial Guinea. By 2043 these numbers will have declined to 34% and 8% respectively (see Chart 7).

At 31% in 2019 (or US$100 billion), the ECCAS informal sector was about five percentage points of GDP larger than the average for Africa, reflecting the extent to which a very large portion of the population ekes out a survival in this sector. By 2043 the GDP share of the informal sector is forecast to modestly decline to 26%, equivalent to US$269.7 billion.

The portion of GDP generated within the informal sector is largest in the DR Congo and smallest in Equatorial Guinea, although data on the latter is likely inaccurate given the skewed income distribution. Since its economy is also the largest within ECCAS, Angola had the largest informal sector size amongst the ECCAS members with a value of US$41.7 billion in 2019. The share of informal sector contribution to GDP does not, however, equate to the relative share of the total labour force within the informal sector that IFs estimates is highest in the DR Congo followed by CAR and Burundi, reflecting the higher rates of extreme poverty in these countries.

Chart 8: Value added by sector in CP, 2015–2043
Billions US$ 2017 and % of GDP
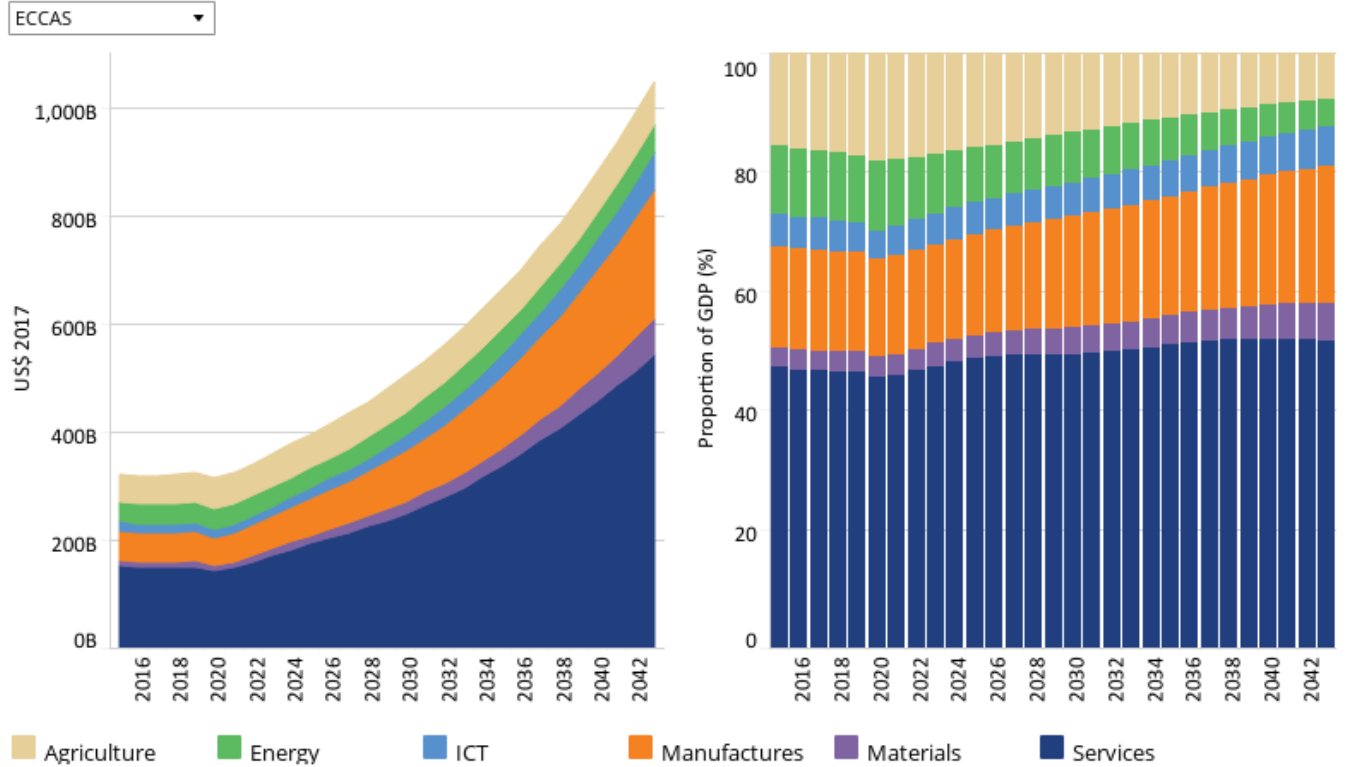
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Agriculture   Energy   ICT   Manufactures   Materials   Services

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).

Generally, the services sector dominates within ECCAS, accounting on average for half of GDP, ranging from 71% in São Tomé and Príncipe to 31% in the DR Congo. The services sector contributes around 58% of GDP in Rwanda, and in other countries the value ranges between 40% and 51%. These are, however, generally low-end services, either as part of subsistence agriculture or low-end retail services located in informal urban areas. The general trend in Africa, and in ECCAS, is for a steady increase in the contribution that the services sector makes to the economy at the expense of other sectors, particularly agriculture, reflected in Chart 8. Despite its substantial agricultural potential, the contribution from agriculture is set to decline from 17% in 2019 to below 8% by 2043, while that from low-end manufacturing, also at 17% in 2019, will modestly increase to 23%. In 2019, agriculture contributed most to GDP in Chad (at 44% of GDP) and least in Gabon (at 6% of GDP). These numbers will decline to 28% and 4% respectively by 2043. The contribution of the energy sector, at 11% in 2019, is boosted by oil production in the Republic of the Congo (23% of GDP in 2019), Equatorial Guinea (17%), Angola (16%) and Gabon (13%) and is set to decline to an average for the Community of less than 5% of GDP by 2043. The contribution to GDP from ICT in Equatorial Guinea (at 11% in 2019) is double that of other countries in the Community.

On average, the sizes of the services and manufacturing sectors are set to increase significantly over the forecast horizon. The sizes of other sectors do not substantially increase to the same extent. For example, the agricultural sector is at US$55.7 billion in 2019 and will increase to US$80.8 billion by 2043. By 2043 the size of the services sector will, however,

have increased from US$151.3 billion in 2019 to US$543 billion. The services sector will grow most rapidly in Angola, where it will increase from US$68.5 billion in 2019 to US$252.5 billion in 2043, significantly larger in size than in other ECCAS member states. Angola will also see a strong increase in the size of its manufacturing sector that will increase from US$20.2 in 2019 to US$89.9 billion in 2043. The size of the agricultural sector increases most rapidly in the DR Congo and Chad. By 2043 the agricultural sector in the DR Congo and Angola will be comparable in size and significantly larger than in other ECCAS member states. The energy sector in Angola is much larger than in other ECCAS member states, growing from US$22.1 billion in 2019 to US$29.5 billion in 2043. By comparison, the energy sector in 2019 was only US$4.1 billion in the Republic of the Congo and modestly increases to US$5.1 billion by 2043.
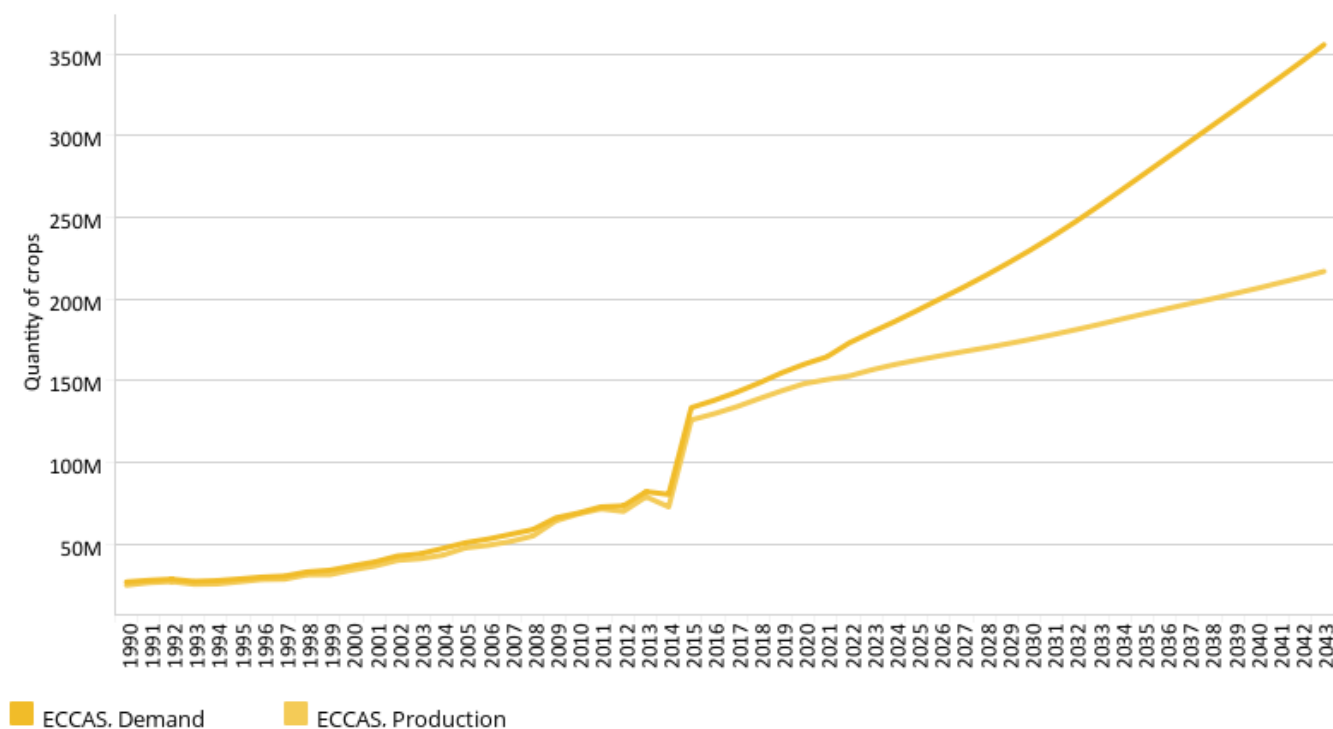

Chart 9: Agriculture production/demand in CP, 1990–2043
Crops million tons

ECCAS. Demand   ECCAS. Production

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

The data on agricultural production and demand in the IFs forecasting platform initialises from data provided on food balances by the Food and Agricultural Organization (FAO). IFs contains data on numerous types of agriculture but aggregates its forecast into crops, meat and fish, presented in million metric tons.

In 2019, total agricultural demand exceeded production by 11 million metric tons—a gap that is expected to increase to 139 million metric tons by 2043, as reflected in Chart 9. The ECCAS region is, therefore, becoming increasingly food insecure, not only because of poor domestic production but also because of changes in dietary preferences. The DR Congo produced the equivalent of 51.45 million metric tons of crop, meat and fish in 2019, the largest by volume amongst the ECCAS members. The DR Congo is followed by Cameroon (32.28 million tons) and Angola (27.06 million tons). São Tomé and Príncipe was the smallest agricultural producer at 134 000 tons in 2019 and is set to double its import dependence. By 2043 the DR Congo will produce 84.81 million tons and Cameroon will be the second largest agricultural producer having overtaken Angola. These three countries, the DR Congo, Cameroon and Angola produce significantly more agricultural

produce than other ECCAS members. Cameroon, the only ECCAS member that exports a modest amount of agricultural goods (at US$1.516 billion in 2019), will see a decline in exports such that it will only export agriculture to the value of US$161 million in 2043.
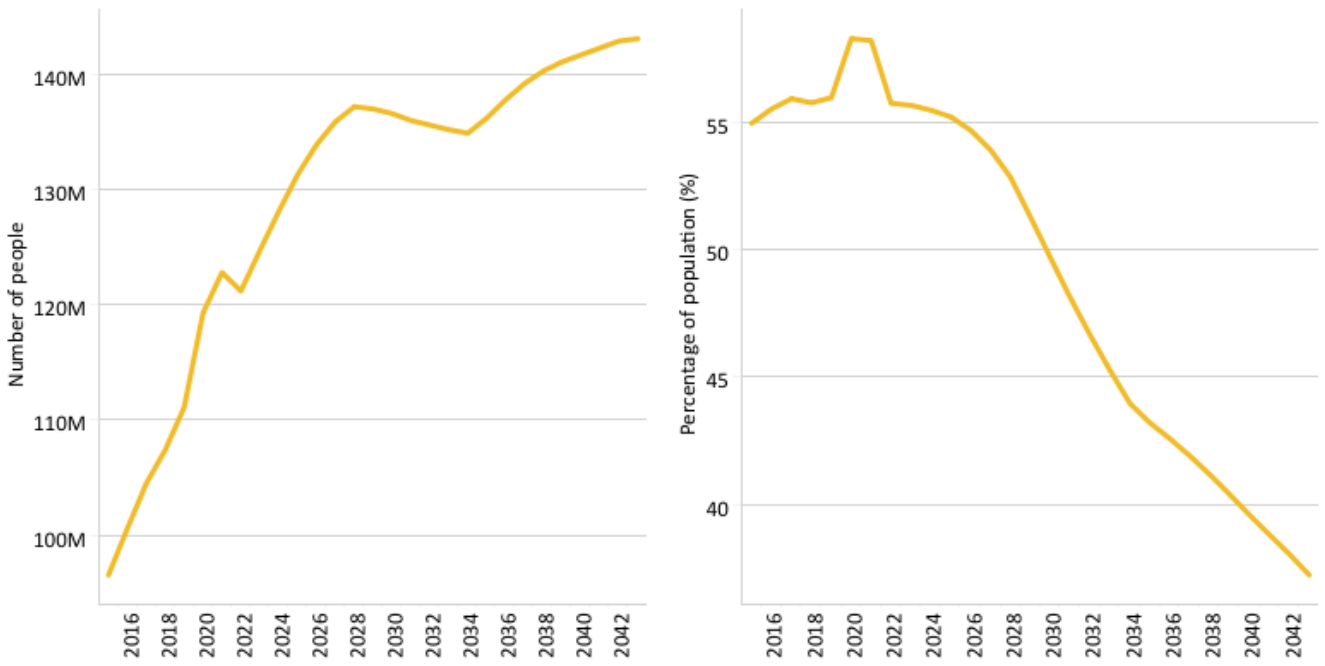
Poverty: Current Path

Chart 10: Poverty in CP, 2015–2043
Millions of people and % of total population

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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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Because of its high rates of population growth and relatively slow economic growth, the number of extremely poor people (using US$1.90) in ECCAS will increase from 111.1 million in 2019 to 143.1 million in 2043, reflected in Chart 10A. Much of that is due to the increase in extremely poor people in the DR Congo, from 62.82 million in 2019 to 81.89 million in 2043. Extreme poverty in Angola will also increase from 14.64 million in 2019 to 21.27 million in 2043.

The poverty forecasts for Equatorial Guinea and Gabon are not reliable, however. Technically, the World Bank classifies these two countries as upper middle-income because of incomes generated from oil and gas, but their general development profiles are comparable to low-middle or low-income countries.

While the absolute number of extremely poor people (using US$1.90) is set to increase, the portion of extremely poor people in ECCAS will decline from 55.94% in 2019 to 37.24% in 2043. Burundi, CAR and the DR Congo have higher rates of poverty than other countries (at 76.69%, 73.91% and 72.30% in 2019). By 2043 rates of extreme poverty will be highest in CAR (68.28%), Burundi (58.4%) and the DR Congo (47.41%). Because inequality in Burundi and Gabon is lower than in other ECCAS countries, economic growth will translate into more rapid poverty reduction in these countries. Average inequality is highest in CAR, São Tomé and Príncipe and Equatorial Guinea.
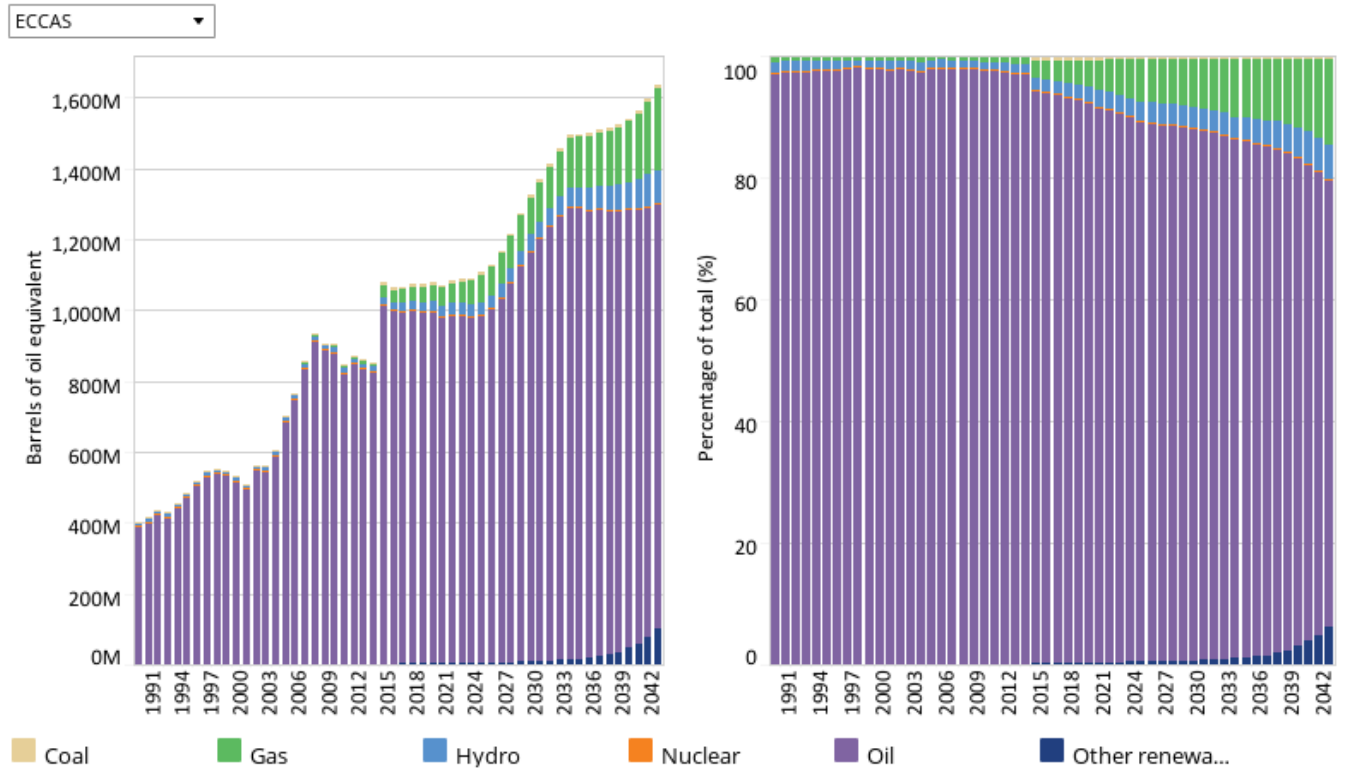
Chart 11: Energy production by type in CP, 1990–2043
Barrels of oil equivalent and % of energy production

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Coal   Gas   Hydro   Nuclear   Oil   Other renewa...

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. 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.

Chart 11A shows that Angola produces significantly more energy amongst the ECCAS member states with a very high dependency on oil. The hydro production potential of the DR Congo is, however, significantly larger than in any other ECCAS member state, reflected in the ambitions of the Grand Inga scheme.

The energy forecast is for modest gas production in Cameroon to peak in 2034 and subsequently in Angola. Next to the DR Congo, Cameroon is also expected to benefit from hydropower. Angola is forecast to have most other renewables by 2043 but modestly so.

The Current Path forecast is that Angola, the Republic of the Congo, Cameroon, Gabon, Equatorial Guinea and Chad all produce modest amounts of natural gas by 2043. The DR Congo has significant potential from hydropower in the form of the Grand Inga scheme. Other countries that see an increase in hydropower over the forecast horizon are Angola and Cameroon.

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

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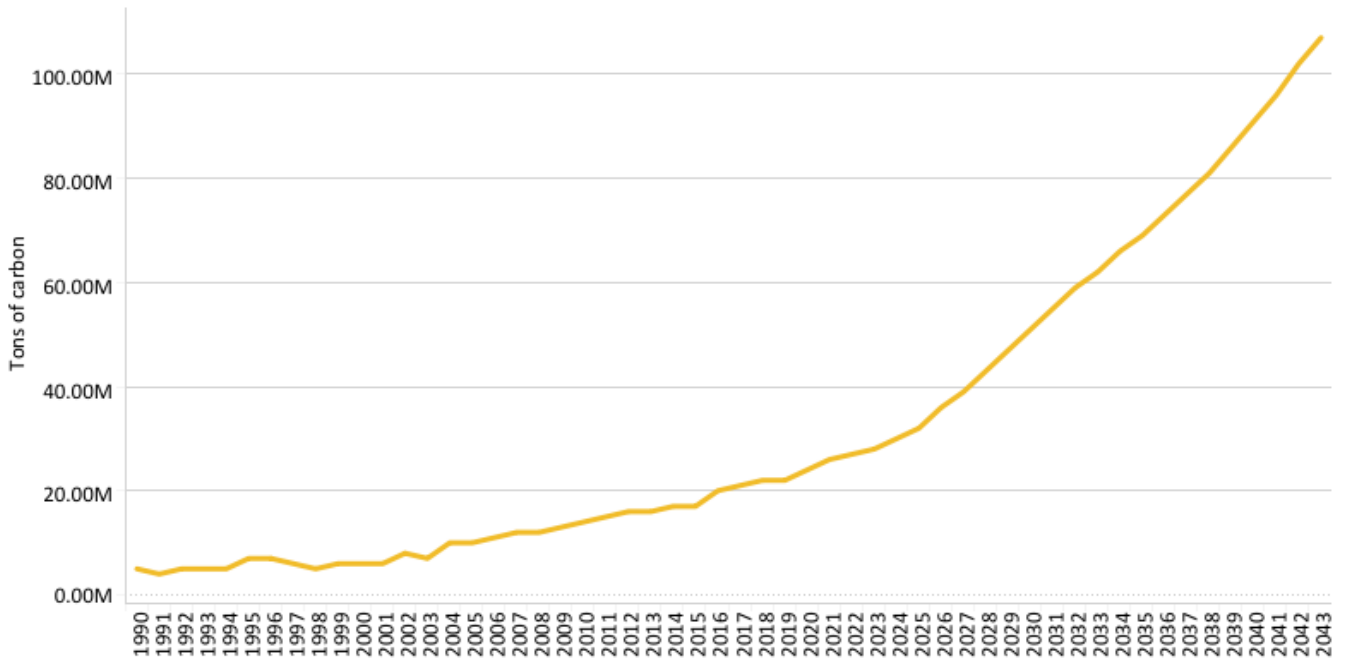
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Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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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.

As a group, ECCAS countries emitted 22 million tons of carbon in 2019—an amount that will increase five-fold to 105 million tons by 2043 (see Chart 12). In the process, ECCAS will increase its portion of African carbon emissions from 5% of the African total to 11%. Because of the size of its economy and large oil production, Angola is the largest emitter, responsible for 53% of the Community's carbon emissions. That portion modestly declines to 41% by 2043 as its oil reserves decline and other sectors and countries increase their carbon footprint, particularly the DR Congo and Cameroon that will increase their carbon emissions.

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Dr Jakkie Cilliers is the ISS's founder and former executive director of the ISS. He currently serves as chair of the ISS Board of Trustees and head of the African Futures and Innovation (AFI) programme at the Pretoria oce of the ISS. His 2017 best-seller Fate of the Nation addresses South Africa's futures from political, economic and social perspectives. His three most recent books, Africa First! Igniting a Growth Revolution (March 2020), The Future of Africa: Challenges and Opportunities (April 2021), and Africa Tomorrow: Pathways to Prosperity (June 2022) take a rigorous look at the continent as a whole.

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