Guinea-Bissau

Guinea-Bissau: Current Path

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Guinea-Bissau: Current Path

Guinea-Bissau: Current Path forecast

Chart 1: Political map of Guinea-Bissau
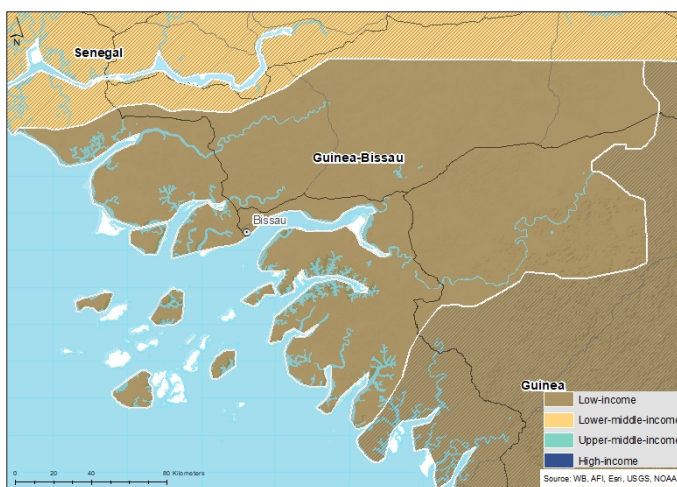
This page provides an overview of the key characteristics of Guinea-Bissau along its likely (or Current Path) development trajectory. The Current Path forecast from the International Futures forecasting (IFs) platform is a dynamic scenario that imitates the continuation of current policies and environmental 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.

Guinea-Bissau is one of 23 low-income countries in Africa. It is located in West Africa and bordered by Senegal to the north and Guinea Conakry to the south-east. Not to be confused with the Republic of Guinea, Guinea-Bissau is one of the smallest countries in Africa, covering a total area of 36,125 km^2. The estimated population of the country as of 2019 was 1.9 million.

The geography of Guinea-Bissau consists mostly of coastal plains, with the two major ecoregions of Guinean forest-savanna mosaic and Guinean mangroves. The climate, like in most of West Africa, alternates between a rainy season and a dry harmattan season. The nation is also home to the Bijagós Archipelago, which is widely regarded as one of the world's most beautiful island groups. Listed as a biosphere reserve by UNESCO, the Bijagós Archipelago features abundant marine flora and fauna, including sea turtles and sea hippopotamuses.

Administratively, Guinea-Bissau is divided into eight regions and one autonomous sector, which are in turn subdivided into 37 sectors. The most populous city by far is the capital Bissau in the Bissau region. Guinea-Bissau has the world's third

largest reserves of bauxite, which contribute to over 90% of the nation's export revenue. The country also produces some agricultural products for export such as cashew nuts, peanuts, palm kernels and sawn lumber.
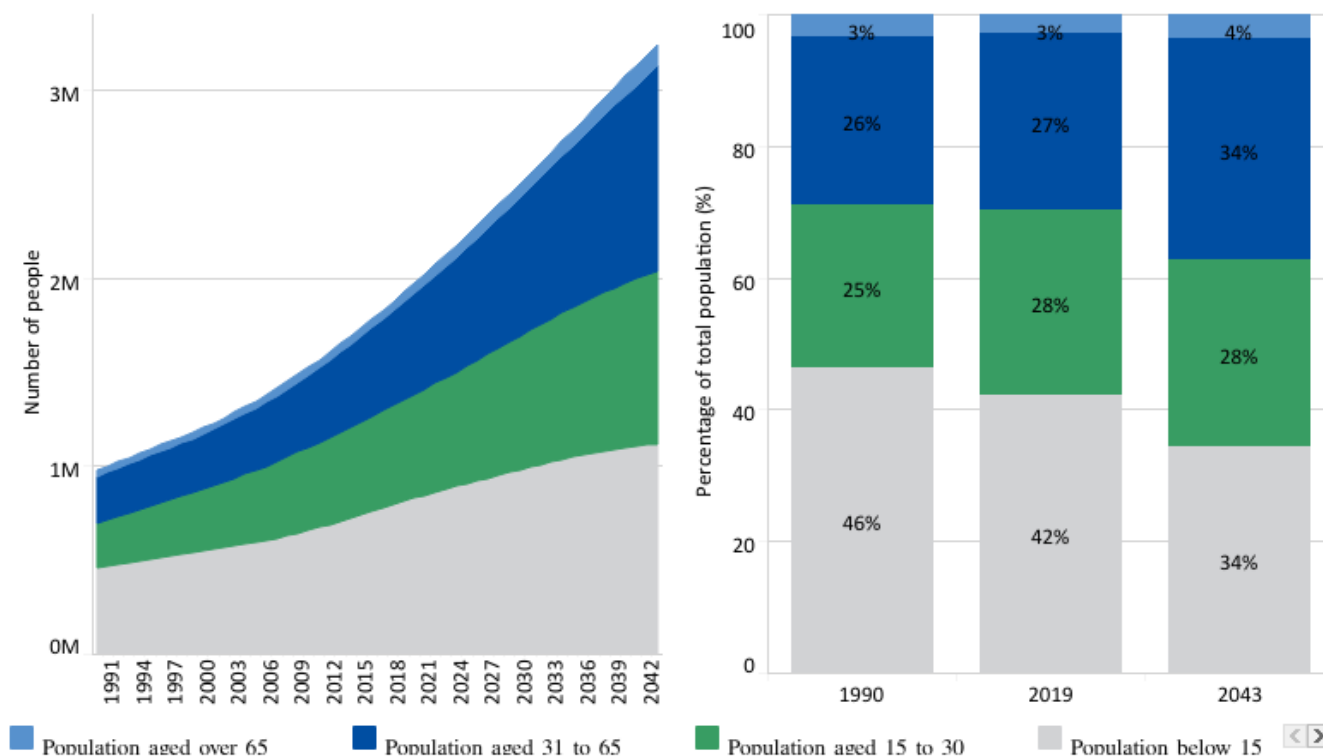
Demographics: Current Path

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

Guinea-Bissau

Legend:
- Population aged over 65
- Population aged 31 to 65
- Population aged 15 to 30
- Population below 15

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

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Guinea-Bissau is the 15th most populous country in West Africa and the 46th most populous in Africa. The country had an estimated population of 1.9 million in 2019, up from 1 million in 1990 —an increase of 97.2% over the past 29 years. On the Current Path, the population of Guinea-Bissau is forecasted to increase to 3.2 million by 2043, representing an approximate increase of 68.6% within the period. The relatively slower rate of population growth reflects the predicted increase in the adoption of improved birth control methods like contraceptives. Guinea-Bissau has a large youthful population with a youth bulge of 48.5% and a median age of 18.7 years as of 2019. The youth bulge, defined as the ratio of the population between the ages of 15 and 29 to the total adult population, will remain above 40% in the Current Path forecast horizon. This raises concerns about youth unemployment in the future. In 2009, the estimated youth unemployment rate was about 30%. The high rate of youth unemployment could instigate uprisings in the country in the future.

In addition, 42.2% of the population is below the age of 15 years and 28% was under the age of 30 years in 2019. The relatively large cohort of children under the age of 15 constrains the materialisation of the demographic dividend. With an expected decline in the fertility rate from 4.6 births per woman in 2019 to 3 births in 2043, the proportion of people below the age of 15 years in Guinea-Bissau is projected to fall to 34.4% over the next 24 years. This signals the likelihood of a larger adult population, increasing the share of people under the age of 64 years from 26.9% in 2019 to 33.6% in 2043. The average life expectancy in Guinea-Bissau was 59.7 years in 2019 and is estimated to increase to 67 years in 2043. The

relatively low life expectancy is mainly due to a high disease burden emanating from both communicable and non-communicable diseases. Although communicable diseases are expected to marginally decline over the period, leading to an increase in life expectancy, deaths as a result of non-communicable diseases will impede this progress.

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

Source: IFs 7.63 initialising from UN World Urbanization Prospects estimate
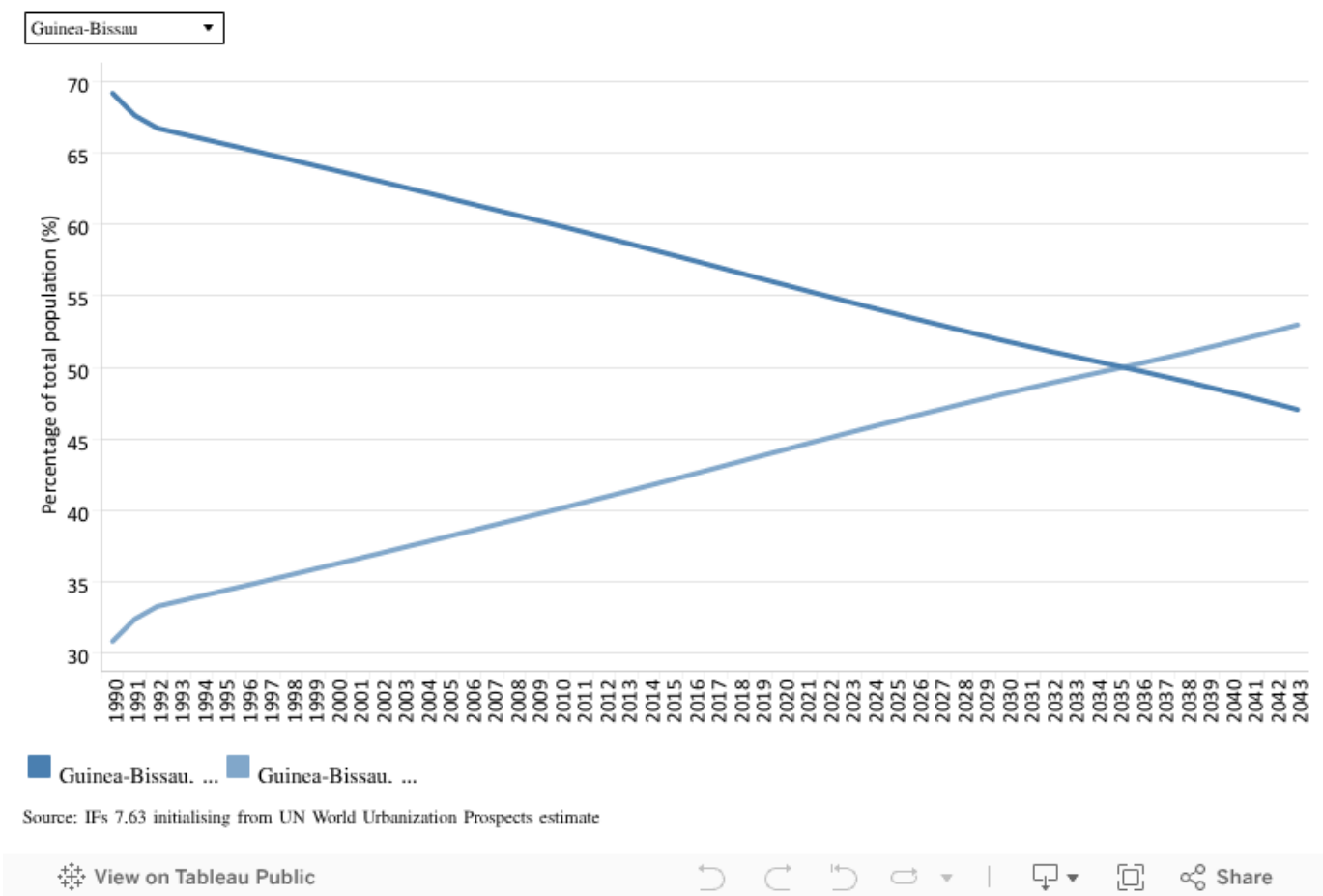
In 1990, the majority of Guinea-Bissau's population (over 69.2%) resided in rural areas. However, over the past 29 years, the number of people residing in rural areas has steadily declined by 13 percentage points, from 69.2% in 1990 to 56.2% in 2019, suggesting an increase in urbanisation. Although the decade-long civil war (1998–1999), coupled with frequent political instability and insecurity in the capital, led to people fleeing major towns like Bissau, Cacheu and Bolama as they migrated to urban areas in search of greener pastures. This trend is expected to continue such that by 2035, the country will achieve parity in rural–urban settlement. On the Current Path, it is projected that by 2043, about 53% of the Bissau-Guinean population will live in urban areas.

Chart 4: Population density map for 2019
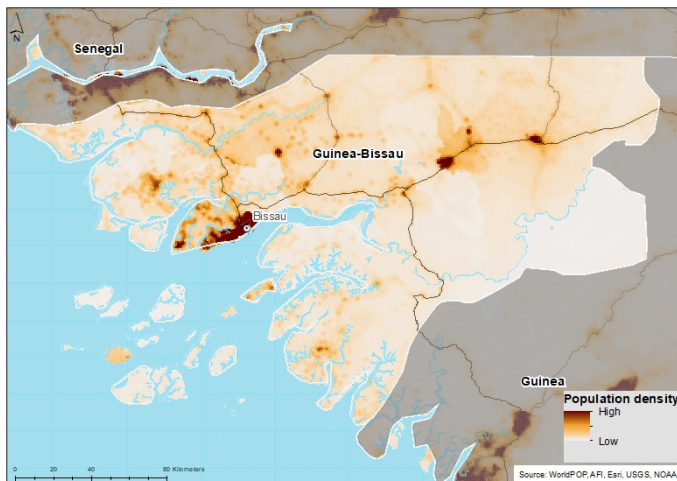
The total land area of Benin is approximately 36 125 km². In 2019, Guinea-Bissau was the 11th most densely populated country in West Africa and 25th most densely populated country in Africa. The population density of Guinea-Bissau was estimated to be about 0.68 people per hectare, which is higher than the average of 0.45 for Africa and 0.65 for West Africa. The majority of the population in Guinea-Bissau lives in small villages and the major towns of the country. The national capital Bissau is the most densely populated city due to its role as the political, economic and cultural centre of the country. This is followed by Bafatá and Gabú as the largest cities respectively. Sparsely populated areas of the country include the savanna regions and the low-lying areas along the coast.
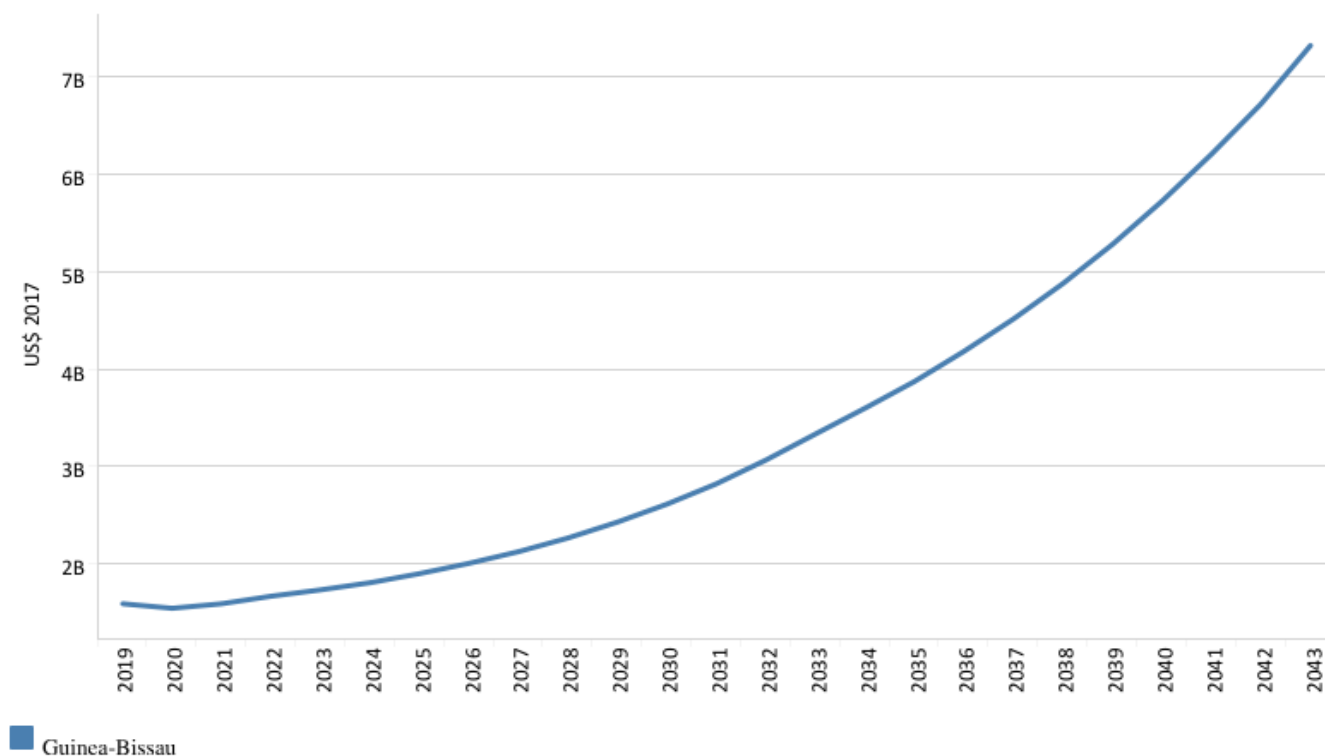
Economics: Current Path

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

Guinea-Bissau ▾

Guinea-Bissau

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

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From 1990 to 2019, the GDP of Guinea-Bissau doubled from US$0.8 billion to US$1.6 billion. Traditionally, the Bissau-Guinean economy is a rural economy that is largely dependent on agriculture, particularly cashew nuts; however, the civil war devastated the economy. For instance, it is estimated that the real GDP fell by 28% in 1998 as a result of the conflict. During this period, the international community imposed sanctions on Guinea-Bissau and development partners withdrew aid to the country. This led to a long period of recession, especially in the early 2000s. In addition to the war, factors such as political and institutional instability, the lack of basic energy and transport infrastructure, as well as international oil and economic crises have significantly contributed to the recession. Attempts to revive the economy have included structural reforms implemented in the Poverty Reduction Strategy Paper (PRSP), resulting in some positive gains and economic recovery for the country. Over the next 22 years, Guinea-Bissau's GDP is estimated to more than quadruple and increase to US$7.3 billion from the current figure. The increase in GDP reflects the economic growth expected to occur within the next 22 years due to the economy moving from being agriculture dominant to more a service-led economy.

Chart 6: GDP per capita in CP, 1990–2043
Purchasing power parity
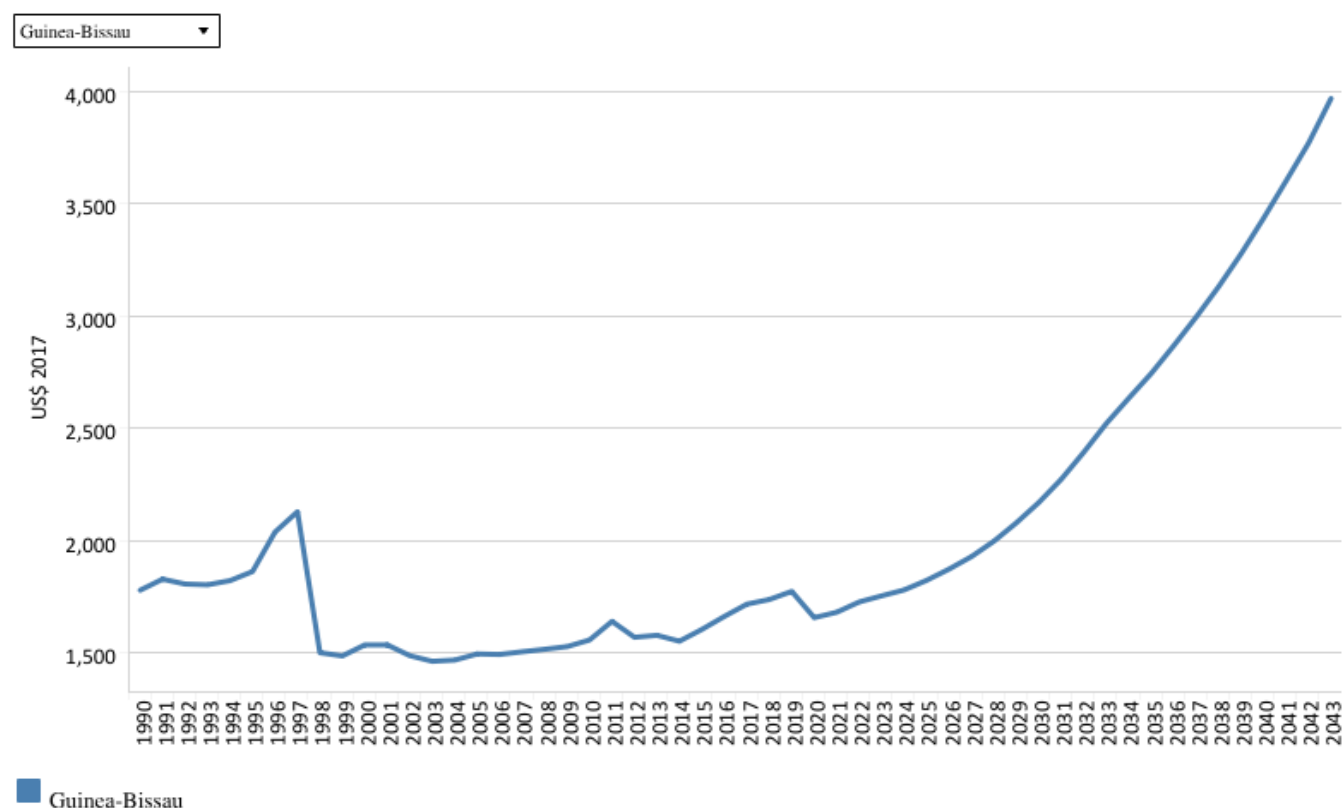
Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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 Guinea-Bissau.

The GDP per capita of Guinea-Bissau has seen a marginal increase over time. The country increased its GDP per capita by 22.5% from US$1 781 in 1990 to US$2 130 in 1997 but saw it sharply decline to US$1 503 in 1998. Afterwards, the GDP per capita for Guinea-Bissau slowly but steadily increased to US$1 776 by 2019. The marginal increase in GDP per capita reflects the relatively high GDP growth compared to population growth over the period. With an expected increase in GDP and decline in fertility rates, it is projected that GDP per capita will rise over the next 22 years, such that by 2043, the GDP per capita will more than double to US$3 967. In 1990, Guinea-Bissau's GDP per capita was US$648 higher than the average for low-income countries in Africa, suggesting that the country was performing better than its income peer group. However, this trend was reversed from 2012, and it is expected to continue until it reverses again in 2034, so that by 2043, Guinea-Bissau's GDP per capita will be US$177 lower than the average for low-income countries in Africa.

Chart 7: Informal sector value in CP, 2015–2043
% of GDP
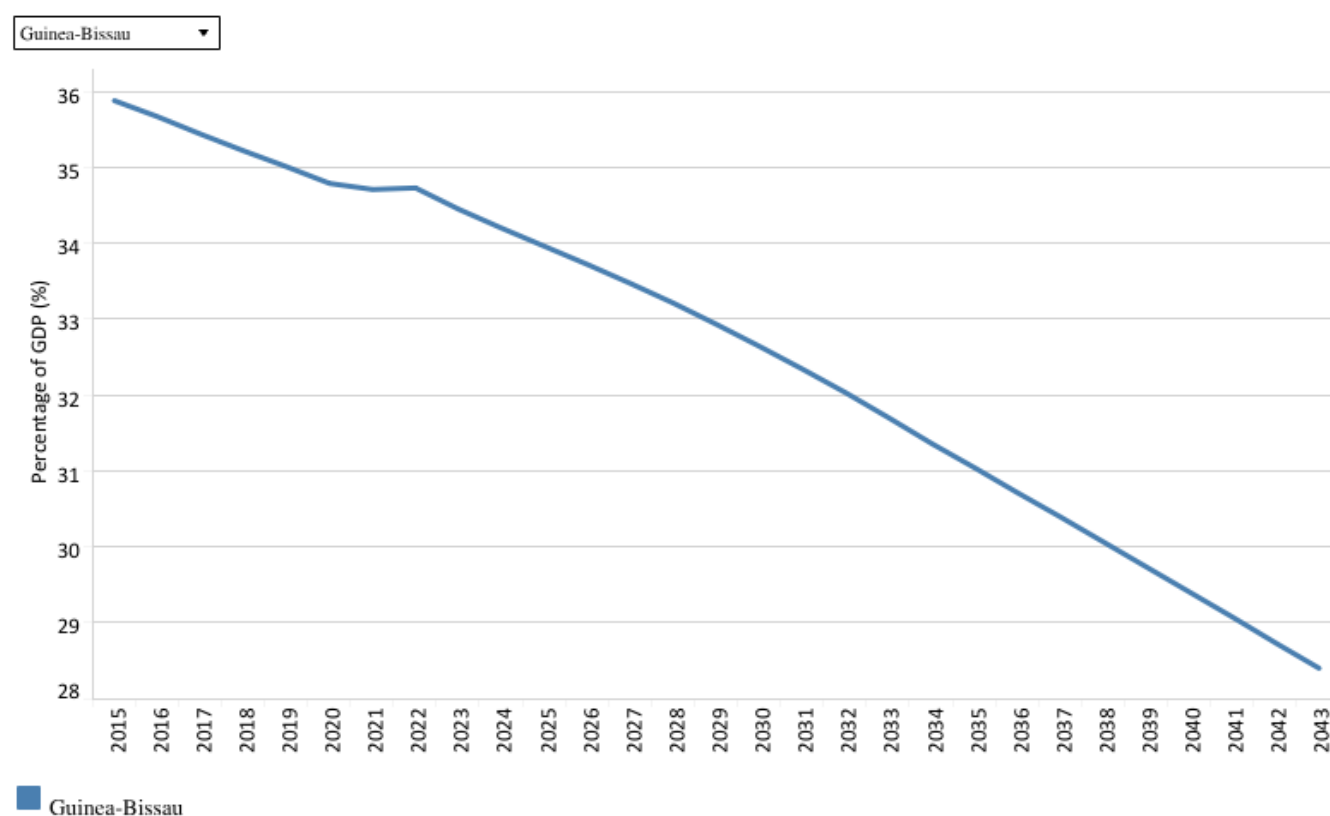
Source: IFs 7.63 initialising from UN Economic Commission for Europe [2008]; Elgin and Oztunali [2012]; Schneider and Enste [2012]

The size of the informal sector in Guinea-Bissau was equivalent to 35% of GDP in 2019. The informal sector in Guinea-Bissau is very large and employs the majority of the workers in the country, especially those who work in the private sector. In 2009, there were only 75 registered firms in the entire country, and informal activities were the main source of income for many people residing in the capital city of Bissau. The informal sector's contribution to GDP is, however, expected to decline to 28.4% by 2043, constituting a 6.6 percentage point decrease over the 22-year period. In 2019, the total number of people employed by the informal economy constituted 67.8% of the total labour force. This is also projected to decline so that by 2043 the total number of people employed in the economy will be 52.3% of the labour force. It is therefore not surprising that the level of informality will decline within the same period. Nevertheless, throughout the period under consideration, the size of the informal sector in Guinea-Bissau is higher than the average for low-income African countries suggesting that Guinea-Bissau has performed relatively poorly in formalising its economy compared to other African countries within its income group.

Chart 8: Value added by sector in CP, 2015–2043
Billions US$ 2017 and % of GDP
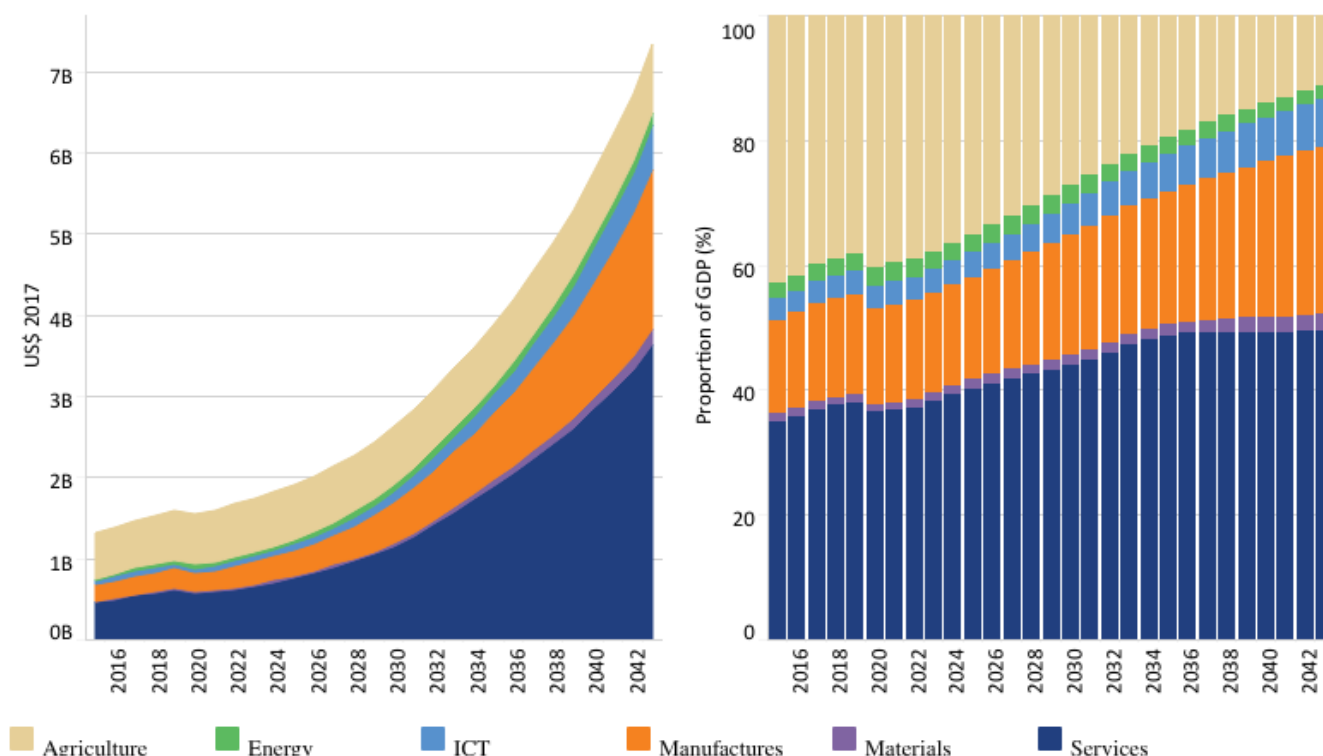
Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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 three largest contributing sectors to GDP in Guinea-Bissau are agriculture, service and manufacturing, respectively. In 2019, the agriculture sector's contribution to GDP was about US$0.6 billion (38.3% of GDP). However, the contribution of agriculture is projected to decline over the period so that by 2043 the sector's contribution to GDP will only be 11.3%. The service sector is currently the second largest contributor to GDP with a total contribution of 38% of GDP. On the Current Path, it is projected that the service sector will increase its contribution to GDP and overtake agriculture as the largest contributor to GDP by 2023. By 2043, the contribution of the service sector to GDP is projected to be 49.5%, which will be 38.2 percentage points higher than the projected contribution of agriculture. Moreover, the manufacturing sector will steadily increase its contribution to GDP from 15.9% in 2019 to 26.8% by 2043, overtaking agriculture as the second largest contributor to GDP in 2035. The growth of the manufacturing sector will be beneficial in creating sustainable jobs in the country, especially for the large youth population. However, the decline in the agriculture sector may indicate challenges for food security in the country.

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

Guinea-Bissau ▼

Quantity of crops

■ Guinea-Bissau. Demand ■ Guinea-Bissau. Produc...
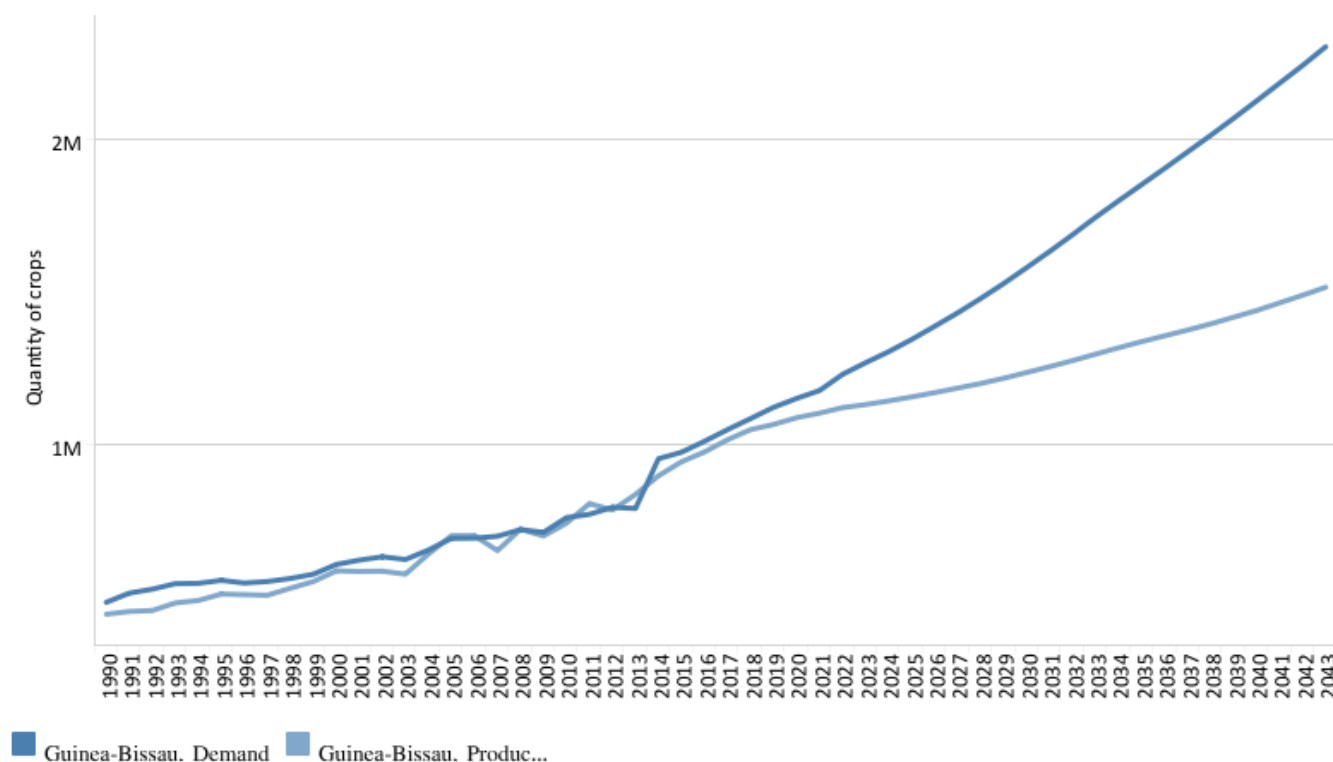
Source: IFs 7.63 initialising from Food and Agriculture Organization Food Balance Sheets

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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 average crop yield for 2019 was 1.9 metric tons per hectare. In 1990, Guinea-Bissau's demand for agricultural products outstripped domestic production by 0.03 million metric tons; this increased to 0.05 million metric tons in 2019, despite the fact that about 61% of the country's total labour force is employed in the agriculture sector. The low output of the sector is partly due to the inability of farmers to adopt modern methods of farming and embark on large-scale cultivation. Again, the high dependence on cashew nuts as a cash crop has affected the cultivation of other food crops, such as rice, in the country. There is also declining interest in the agriculture sector, reflected in its dropping share of total employment. Although the yield per hectare for crops is expected to increase from 1.9 metric tons per hectare in 2019 to 2.5 metric tons per hectare in 2043, the gap between demand and production will widen. By 2043, demand will outstrip domestic production by about 0.78 million metric tons, representing a 1 200% increase over the period. This raises serious concerns about food security in the country within the next 22 years.
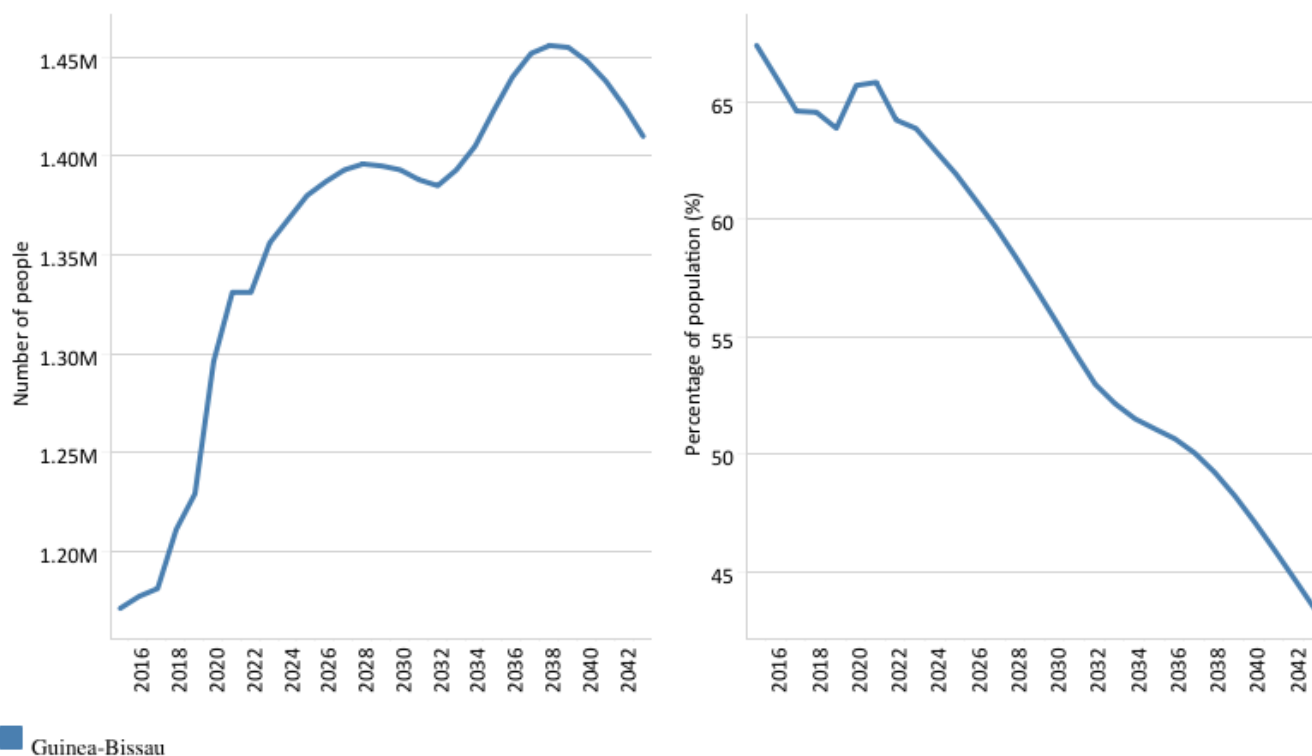
Chart 10: Poverty in CP, 2015–2043
Millions of people and % of total population

Guinea-Bissau $1.90

Guinea-Bissau

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 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.

As a low-income country, Guinea-Bissau uses the US$1.90 per person per day benchmark. The country is one of the poorest in Africa and the world, with two out of every three Bissau-Guinean citizens estimated to be multidimensionally poor. Poverty is more widespread outside the capital city of Bissau and affects women and children more than men. As of 2019, there were still over 1.2 million people, constituting 63.9% of the population, living on less than US$1.90 per day. The absolute number of poor people in Guinea-Bissau is projected to rise to 1.4 million in 2043. However, the proportion of poor people is estimated to decline by 20.4 percentage points to 43.5% in 2043. This relatively high percentage of poor

people can be attributed to the expected growth in population that will outpace development progress in the country. To address this, the National Poverty Reduction Strategy Paper II (PRSP) was prepared by Guinea-Bissau in 2011 for implementation from 2011 to 2015, and it was meant to achieve economic growth and reduce the high levels of poverty in the country. Throughout the period under consideration, the proportion of poor people in Guinea-Bissau is higher than the average for low-income countries in Africa. By 2043, it is estimated that the extreme poverty rate in Guinea-Bissau will be 18.3 percentage points above the projected average for low-income countries in Africa.
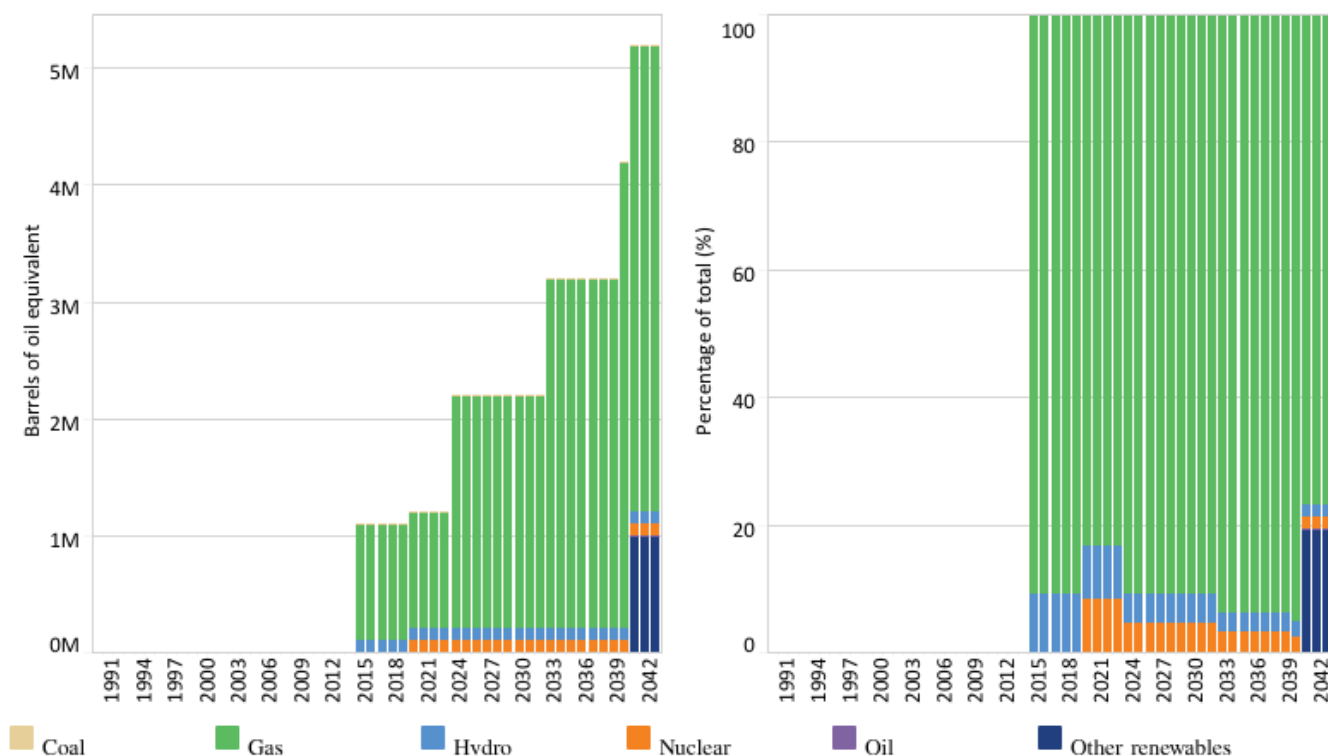
Chart 11: Energy production by type in CP, 1990–2043
Barrels of oil equivalent and % of energy production

Guinea-Bissau ▼

Coal   Gas   Hydro   Nuclear   Oil   Other renewables

Source: IFs 7.63 initialising from World Energy Outlook data

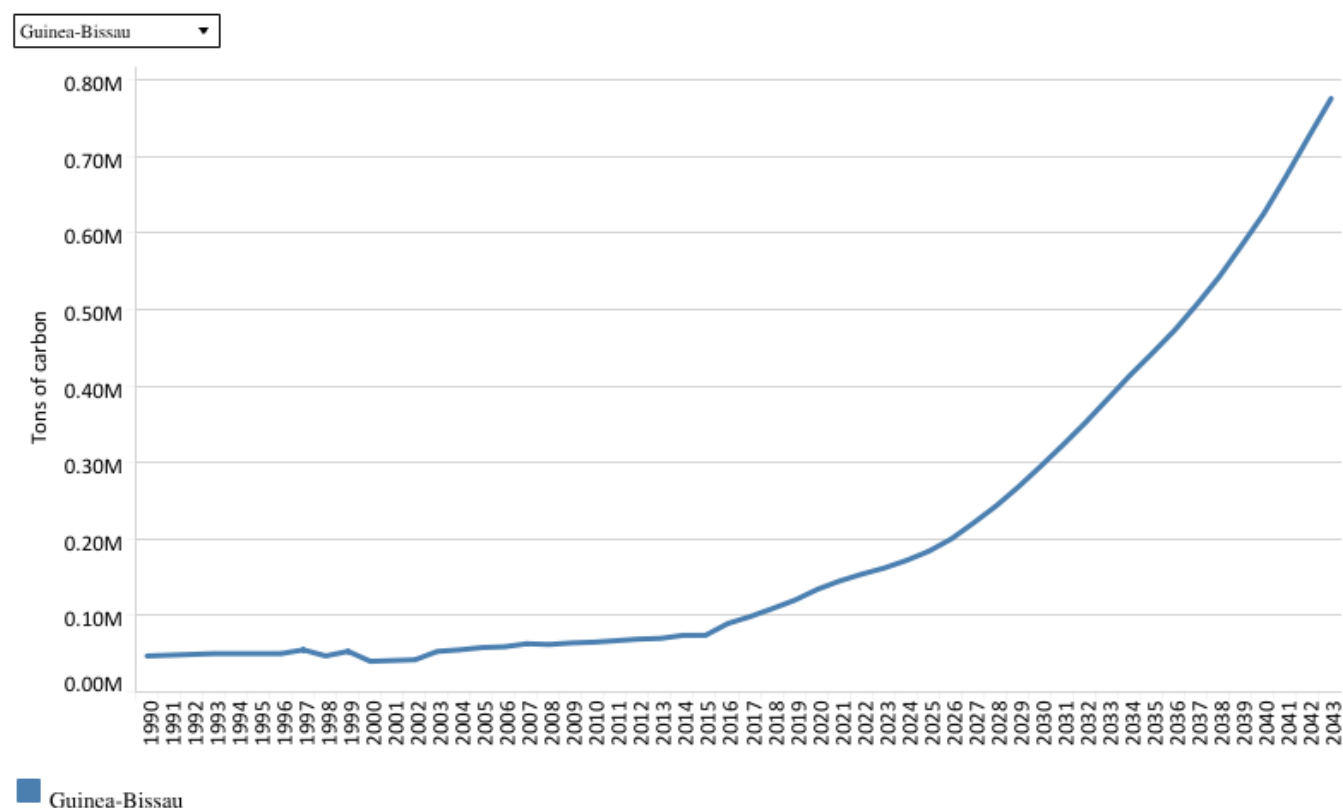⁜ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | ⬇ ▼ ⛶ ⋘ Share

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 most widely produced energy source in Guinea-Bissau is gas, followed by hydro and nuclear. In 2019, the total amount of gas produced in the country was 1 million BOE, constituting 90.9% of the total energy production. Although the total amount of gas produced is projected to quadruple to 4 million BOE in 2043, its share of total production will decline to 76.9%. Hydro production constituted 9.1% of total energy production in 2019 but is projected to decline to about 2% in 2043. Likewise, nuclear power, which in 2019 constituted about 8.3% of total production, is projected to decline to about 2% by 2043. The country will, however, begin the production of other renewable energies, such as solar and wind, so that these will constitute about 19.2% of total energy production in 2043.

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 (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.

Guinea-Bissau has very low levels of carbon emissions with an almost zero-emission rate. This negligible level of carbon emissions can be attributed to minimal industrial activity in the country. Regardless, carbon emissions increased steadily from 1990 to 2019. On the Current Path, carbon emissions are forecast to increase to 1 million tons by 2043.

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Cite this research

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Mr Enoch Randy Aikins joined the AFI in May 2021 as a Researcher. Before that, Enoch was a research and programmes officer at the Institute for Democratic Governance in Accra in charge of local governance reforms, poverty and inequality and public sector reforms. He also worked as a research assistant (economic division) with the Institute for Statistical Social and Economic Research at the University of Ghana. Enoch's interests include African politics and governance, economic development, public sector reform, poverty and inequality. Enoch is a Young African Fellow at the School of Transnational Governance, European University Institute in Florence and has an MPhil in economics from the University of Ghana, Legon.

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