



# Mauritania

## Mauritania: Scenarios

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Last updated 11 September 2025 using IFs v8.38

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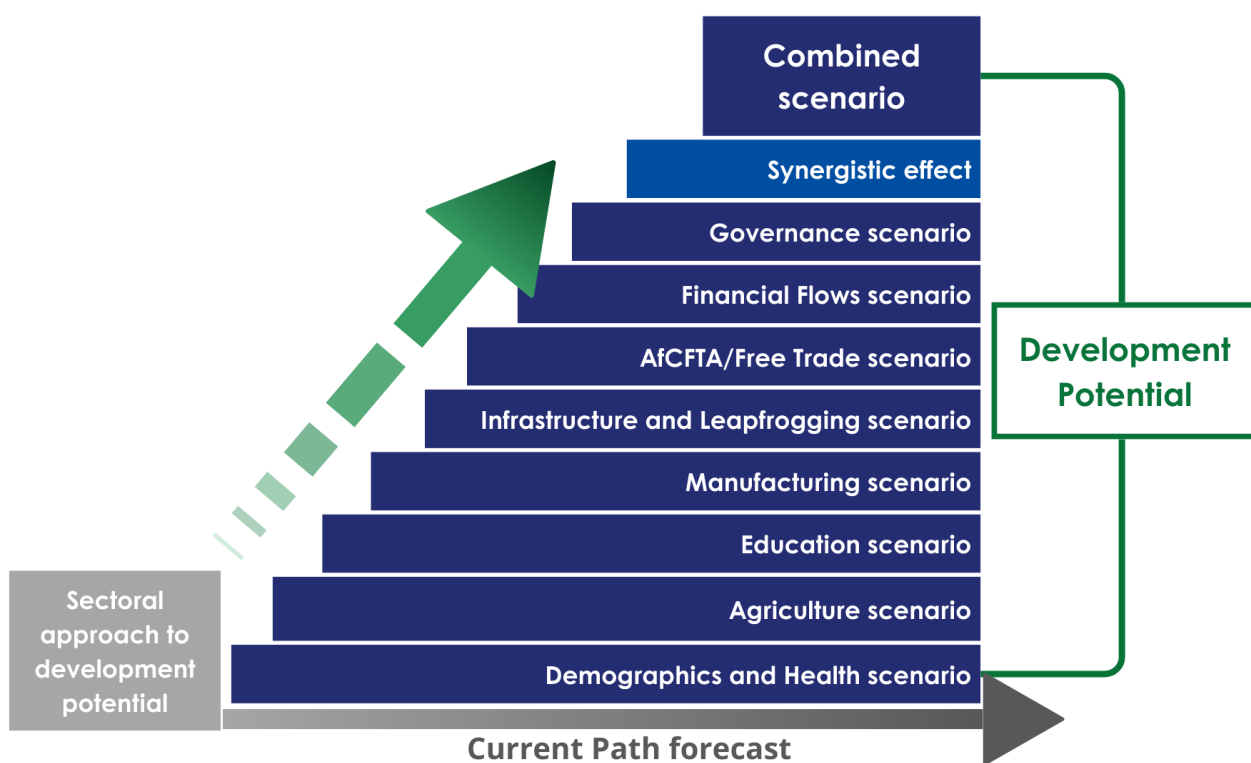
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## Mauritania: Scenarios

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### Briefly

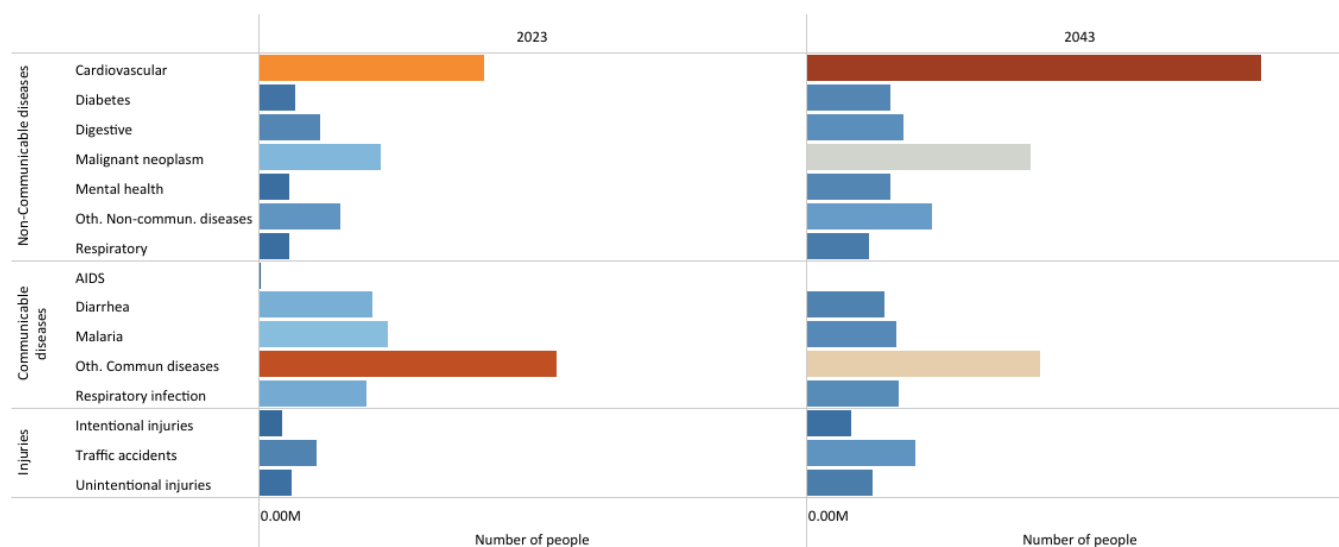
Chart 10: Relationship between Current Path and scenarios



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

## Demographics and Health scenario

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



Source: IFs 8.38 initialising from IHME data

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

The Demographics and Health scenario 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.

Mauritania's healthcare system is organised on a pyramid structure with three levels: central, regional and intermediate, with public and private health structures. The central level consists of the minister's office, central departments and national hospitals, which are responsible for the strategic direction and coordination of central services and national programs. At the regional level, the system includes all outpatient care provided in regional hospitals, most of which are autonomous establishments. Finally, at the intermediate level, the Regional Health Action Directorates (DRAS), run by regional directors under the authority of the Wilaya's social and health development council and the technical supervision of the health directorate, are responsible for implementing the department's health policy at the regional level. The system is mainly state-funded, but patients often have to pay for their own medicines and supplies.

The epidemiological profile of the country is dominated by lower respiratory infections, stroke and complications from preterm birth. Additionally, communicable diseases like malaria, tuberculosis and HIV/AIDS, as well as non-communicable diseases (NCDs), are significant health concerns. Maternal and infant mortality rates are also relatively high.

In Mauritania, NCDs represent a major public health challenge. For instance, 4 060 people in Mauritania died from cardiovascular disease in 2023. In addition, almost 2 000 people died of chronic respiratory disease in Mauritania.

In Mauritania, further deaths are due to post-partum haemorrhage, pre-eclampsia, infections and lack of access to quality health care during pregnancy, childbirth and afterwards. In addition, these deaths are often the result of delays in dealing with obstetric emergencies, as well as a lack of health infrastructure and qualified medical staff. However, in line with Mauritania's National Strategy for Accelerated Growth and Shared Prosperity 2016-2030, the country launched a new healthcare initiative aimed at supporting adolescents and mothers to gain better health coverage; though the success of this program is yet to be seen.

In the Current Path, cardiovascular deaths in Mauritania will double to reach 8 200 by 2043. Deaths due to respiratory infections should decline to reach 1 700 people by 2043.

In 2023, 24.5% of children aged 0-5 suffered from stunted growth - a rate 1.9 percentage points higher than that of LMICs in Africa, at 26.4%. For malaria, in 2023, the death rate from malaria was 0.35 per 1000, slightly lower than the average of 0.39 per 1000 in LMICs in Africa. In 2023, maternal mortality in Mauritania was 429.5 deaths per 100 00 live births. This figure should fall to 229.1 deaths per 100 00 live births in the Current Path, however, is well above the target of 70 deaths per 100 00 live births as set out in the SDGs.

In Mauritania, many communicable diseases represent health risks, including malaria, yellow fever and other insect-borne diseases, as well as water-borne and food-borne diseases ths in lower-middle-income African countries. In 2023, HIV prevalence was 0.29% in the general population, but reached 9% among sex workers (10.3% in Nouakchott, 2.9% in Nouadhibou) and 23.4% among men who have sex with men (MSM) (24.9% in Nouakchott, 4.7% in Nouadhibou). However, these rates are lower than in previous years.

Reducing the disparity in healthcare provision between people living in large urban areas such as Nouakchott and those living in small towns and rural areas remains a major challenge for the country. Also, human capital in health care, insufficient infrastructure and financial resources for some groups of Mauritians remain a major concern.

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

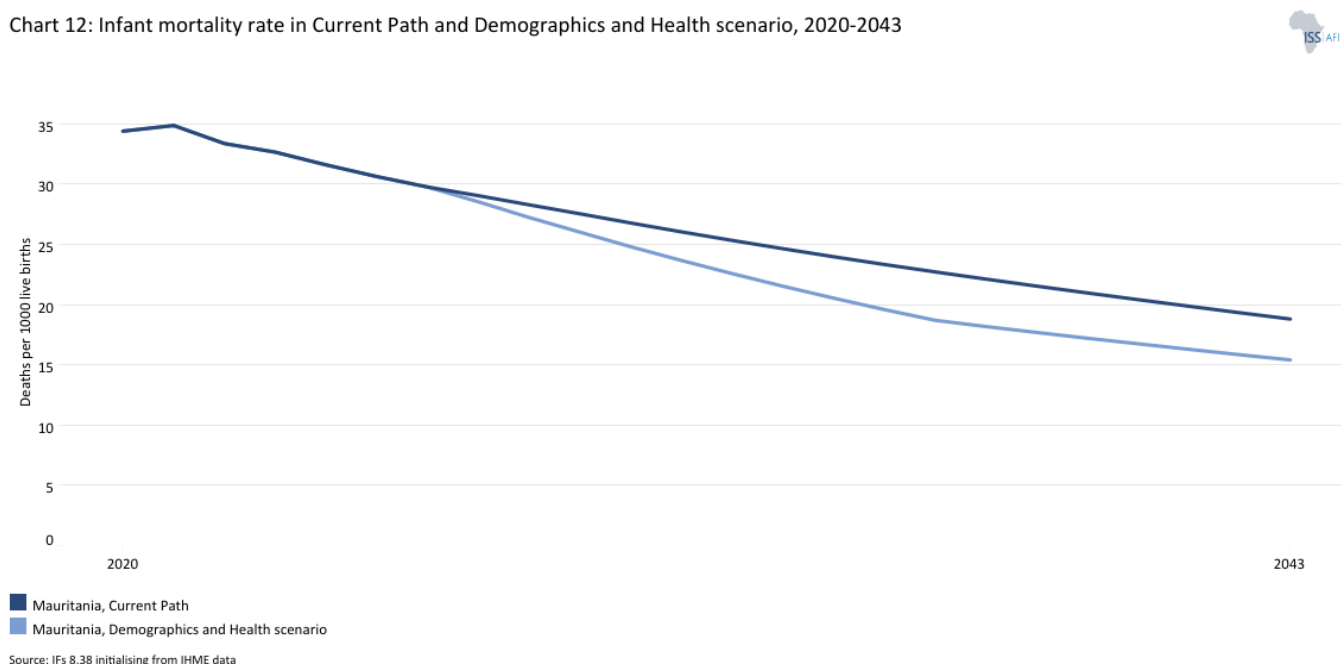


Chart 12 presents the infant mortality rate in the Current Path and in the Demographics and Health scenario, from 2020 to

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.

The Mauritanian government has made considerable efforts over the last three decades to improve its health system, as can be seen from the infant mortality rate. In 1990, the number of deaths per 1 000 live births was 70.9 and this figure had fallen to 32.7 by 2023, a reduction of 38.1 percentage points. In the Current Path, infant mortality will continue to fall, reaching 18.8 deaths per 1 000 live births by 2043.

The Demographics and Health scenario will further reduce Mauritania's infant mortality rate to 15.4 deaths per 1 000 births by 2043. This will be 3.4 fewer deaths than the Current Path. Although this does not fully meet the Sustainable Development Goal (SDG) target, it pushes Mauritania close to the target, emphasising the need for the country to continue investing in access to improved healthcare service. The life expectancy will improve to 78.4 years compared with 76.9 in the Current Path.

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

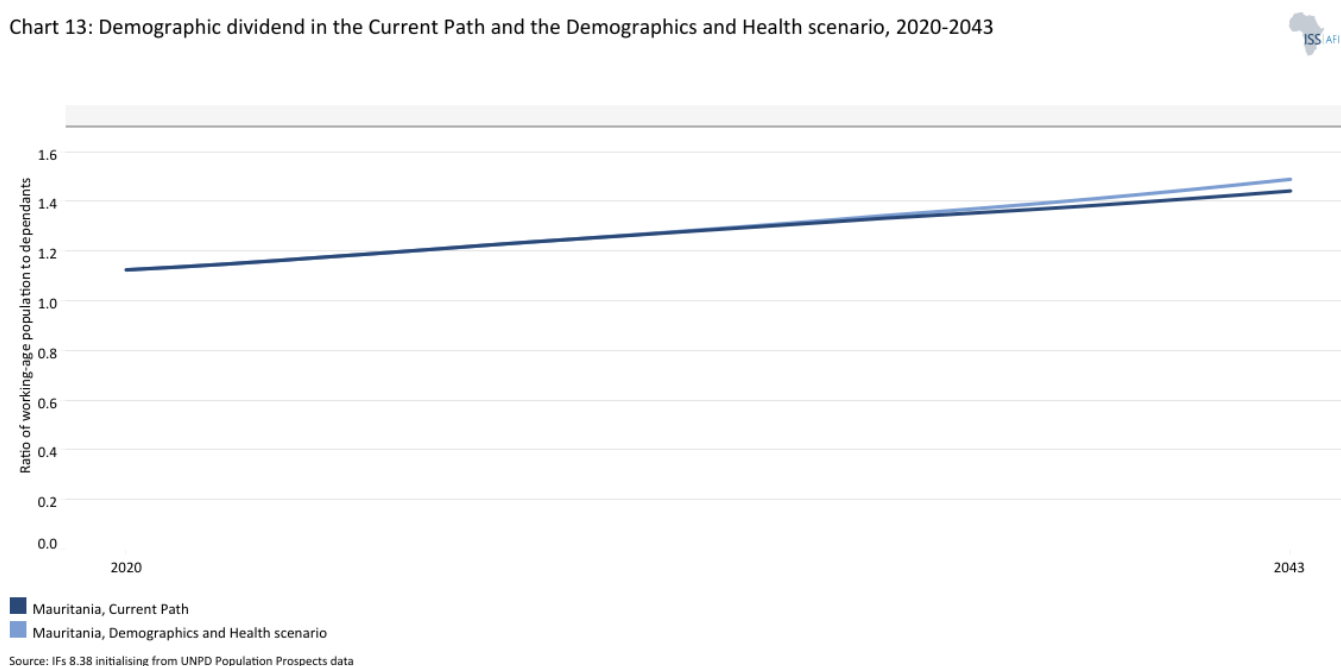


Chart 13 presents the demographic dividend in the Current Path and in the Demographics and Health scenario, from 2020 to 2043.

The dividend is the window of economic growth opportunity that opens when the ratio of working-age persons to dependants increases to 1.7 to 1 and higher.

The demographic dividend is the economic growth generated by changes in the population structure. It generally materialises when the ratio of the working-age population to dependants is at least 1.7 to one, meaning that for every dependant, there are 1.7 persons of working age. When there are fewer dependants to take care of, it frees up resources for investment in both physical and human capital formation.

In 2023, the ratio of the working-age population to dependants in Mauritania was 1.2 - below the value of 1.7 needed to expect the materialisation of the demographic dividend. This figure is slightly lower than 1.4 for the average LMICs in Africa. In the Current Path, the ratio of the working-age population to dependants will increase steadily, reaching about 1.4 by 2043.

In the Demographics and Health scenario, Mauritanian's demographic dividend ratio will slightly increase, reaching 1.5, which is 0.1 above the Current Path. Although slight, this improvement should enable Mauritania to take better advantage of its economic situation and improve the economy, as the ratio moves closer to 1.7.

## Agriculture scenario

Chart 14: Crop production and demand in the Current Path, 1990-2043  
Area chart show demand less production

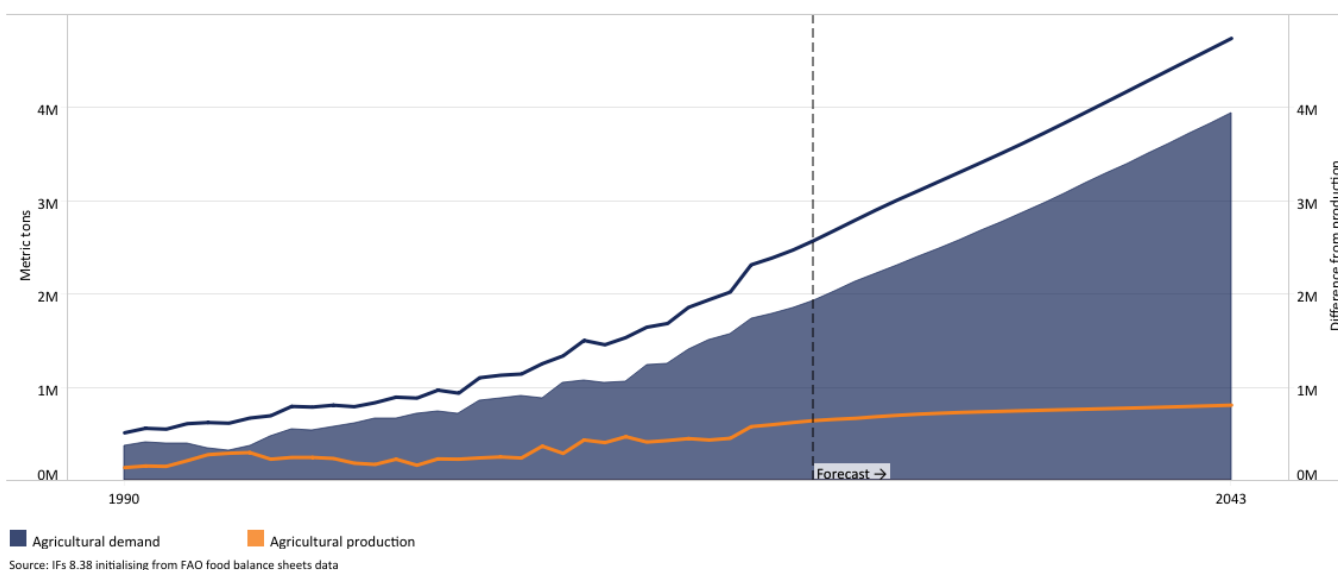


Chart 14 presents crop production and demand in the Current Path from 1990 to 2043.

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. 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, enhanced forest protection signifies a commitment to sustainable land use practices.

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

Mauritania's agricultural sector is essential to the economy, contributing 17% of GDP and employing around 21% of the working population. It is the main source of subsistence for the majority of the rural population, where more than 62% of the population lives mainly from these activities. Local production helps to cover needs in cereals (30%), red meat (100%) and milk (30%). In 2023, Mauritania's agricultural sector grew, boosting GDP in the primary sector to 6.3%. Most of the cultivated land is used for rain-fed production, but irrigated farming, mainly concentrated in the south of the country along the Senegal River, is also important.

In 2023, Mauritanian total agricultural production was 2.1 million metric tons and the crop production was 641 840 metric tons. The total demand for agricultural products has always been more than the total production, and stood at about 3.6 million metric tons in 2023, of which 2.6 metric tons, equivalent to 72.2% of total demand, were for crops. Fish accounts for a small share of Mauritania's agricultural demand. Indeed, fishing plays a large role in the Mauritanian agriculture and economy as a whole. Both industrial and small-scale fishing are prevalent, with 31% of the population finding employment fishing in some capacity. Industrial fishing is responsible for the lionshare of catches, up to 90% of fish are caught by industrial outfits. However, this industry only employs 12% of Mauritanians and much of the production does not rebound in the Mauritanian economy, as fish are shipped abroad to be processed without being offloaded in Mauritania.

The economy shows a crop demand deficit of 1.9 million metric tons per hectare in 2023. This leads to inefficiency in crop

production and exposes farmers and the country's food supply to a level of risk from a changing climate. However, this situation of inefficiency in crop production exposes farmers and the country to a high level of risk to food security. This deficit is linked to the challenges of agricultural development and improved farming techniques, water resource management (low level of irrigation - only 28% of arable land currently utilising irrigation), the lack of infrastructure, the weakness of producer organisation and climate change. In addition, crop yields in Mauritania remain low. In 2023, crop yields in Mauritania stood at 1.3 metric tons per hectare, far below the average of 5.3 metric tons per hectare for lower-middle-income countries in Africa.

Faced with these challenges, the Mauritanian government, with the support of the International Fund for Agricultural Development (IFAD), the United Nations Environment Programme (UNEP) and African Development Fund (ADF), has set up a number of projects, including the Mauritanian Agricultural Transformation Support Project (PATAM), which aims to support the inclusive development of agricultural sectors and improve food security and the living conditions of the target populations.

In the Current Path, Mauritania's total agricultural production will rise to 2.9 million metric tons by 2043. Total agricultural demand will rise to 6.6 million metric tons by 2043, and crop production is expected to reach 807 130 metric tons, i.e. an increase of 161 840 metric tons compared to the Current Path. Crop yields will increase slightly to 1.5 metric tons per hectare by 2043, remaining far below to the average of 6.4 metric tons per hectare for lower-middle-income countries in Africa.

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

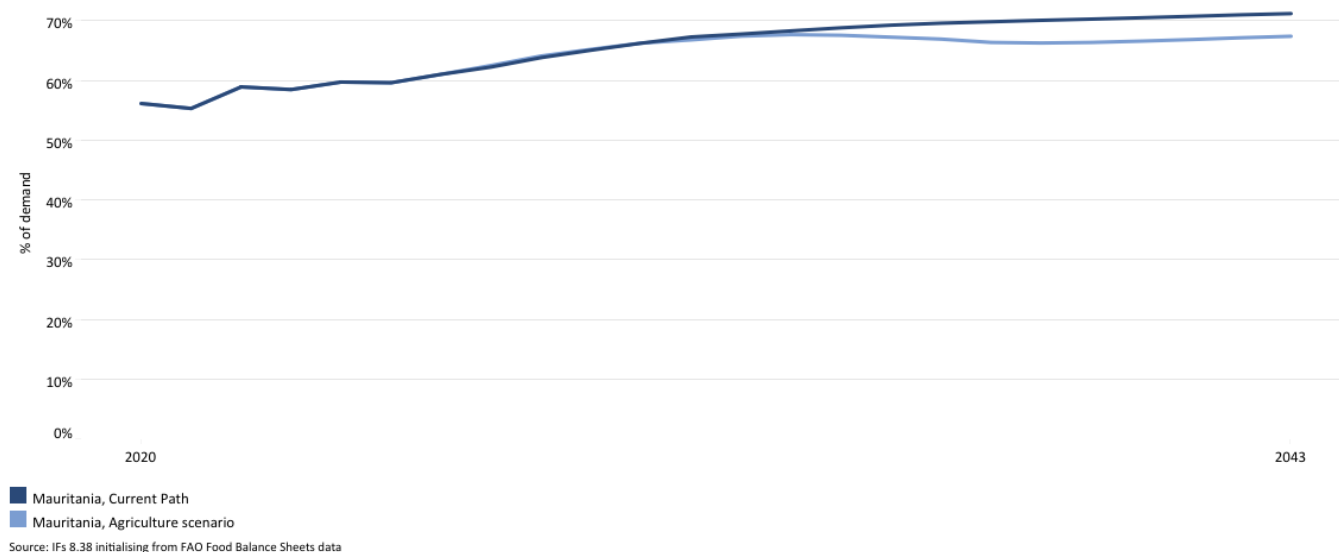


Chart 15 presents the import dependence in the Current Path and the Agriculture scenario, from 2020 to 2043.

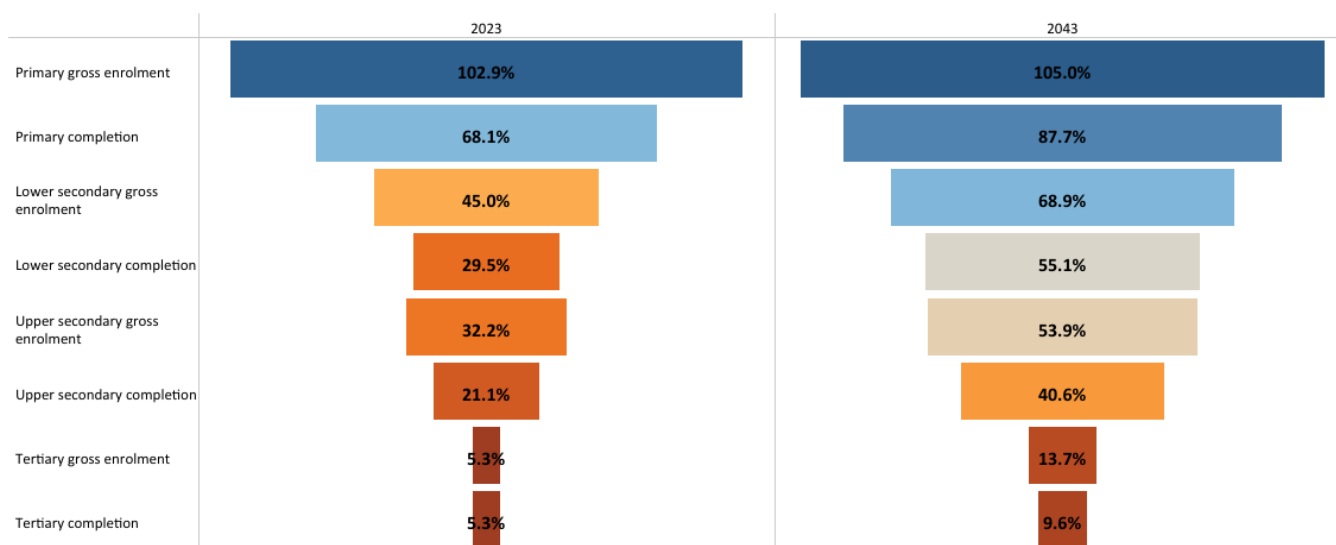
Mauritania is highly dependent on food imports, with agricultural production limited by the arid climate and droughts. Over 70% of the country's food comes from Morocco and Senegal. In 2023, import dependency for crops in Mauritania stood at 76.3% of demand, far above the average of 10.2% for lower-middle-income countries in Africa. In the Current Path, crop import dependency is expected to increase further, reaching 84.6% of total demand in 2043, making Mauritania vulnerable to food price fluctuations and food crises.

In the Agriculture scenario, yields per hectare will increase to 1.9 metric tons by 2043, a 26.7% improvement compared to the projections of the Current Path. The improvement in yields will lead to an improvement in total agricultural production.

In the Agriculture scenario, total agriculture production will increase to 3.1 million tons, almost 0.2 million metric tons, or 6.9%, more than the Current Path by 2043. Crop production in Mauritania will rise by 25.0% above the Current Path to 1.0 million tons in the Agriculture scenario by 2043. The projected increases in crop production in the Agriculture scenario reduce the import dependency of crops in the country compared to the Current Path. By 2043, the net import of crops will decline to 79.8 as per cent of demand in the Agriculture scenario, instead of 84.6 per cent in the Current Path. The Agricultural scenario shows that if the Mauritanian government adopts a rigorous and effective agricultural policy, the country should be able to reduce its crop imports and increase its chances of self-sufficiency if meaningful measures are taken to reorganise the agricultural sector.

## Education scenario

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



Source: IFs 8.38 initialising from Barro-Lee data

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

The Education scenario represents reasonable but ambitious improvements in intake, transition, and graduation rates from primary to tertiary levels and better quality of education at primary and secondary levels. 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.

Investing in education is pivotal for tackling poverty, addressing gender and social inequalities and creating prosperous nations. The [African Union](#), in its economic blueprint Agenda 2063, is betting on young people to drive its vision through modern skills that can only be gained through education. Mauritania's education system [comprises](#) several levels, from primary to higher education. It is organised into two main sub-systems, primary and secondary education on the one hand, and higher education on the other. Mauritania's school system is predominantly public; however, due to the prevalence of Islam in education, it is not secular. The two main languages of instruction are French and Arabic. French is used mainly in higher education and scientific subjects.

Since 1999, Mauritania has embarked on ambitious reforms to unify its education system. The '[National Education Sector Development Programme](#)' (PNDSE), in its various versions, is a comprehensive, multi-year plan designed to improve the country's education system. It focuses on expanding access, improving quality and promoting equity, especially for marginalised groups. The current program, PNDSE III, covers the period from 2023 to 2030 and builds upon previous iterations. In addition, with the adoption of a [new law](#) in 2022, Mauritania has embarked on a major reform of its education system, introducing compulsory and free schooling for children aged 6 to 15.

In 2023, the gross enrolment rate for primary school students in Mauritania was 102.9%, a strong increase from 46.1% in 1991 and just above the average of 101.1 % for LMICs in Africa. Net enrolment rate in the same period stood at 82.5%. The relatively high enrolment rate at the primary level is partly due to the strategy of not excluding students up to the age of

15. In the Current Path, Mauritania's gross enrolment rate will reach 105.0% in 2043, and the net enrolment rate will be 92.0%. The country's figure will remain above that of LMICs in Africa. The gross primary completion rate stood at almost 68.1% in 2023, indicating that not all children who enrolled completed the last grade of primary school in Mauritania. The country's figure was far below the average of 85.2% for LMICs in Africa. In the Current Path, the number of children completing primary school will increase to 87.7% in 2043. This is still slightly below the average of 92.3% for LMICs in Africa.

Among those who complete primary education, some are expected to move directly into lower-secondary schooling, others may enter after a period out of school, and some may never make the transition. This pattern of progression influences the potential for advancement through lower-secondary, upper-secondary, and eventually tertiary education levels

In 2023, gross enrolment for lower- and upper-secondary levels in the country stood at 45.0% and 32.2%, respectively. By 2043, gross enrolment for the lower-secondary level will rise to 68.9%, while that of the upper-secondary level will rise to 53.7%. This indicates a significant drop in student retention from lower- to upper-secondary education. These figures are lower than in lower-middle countries in Africa. Completion rates drop from 29.5% in the lower-secondary level to just 21.1% in the upper-secondary level. In the Current Path, lower- and upper-primary completion rates will modestly rise. By 2043, 55.1% of students are expected to complete their lower-secondary education compared to 40.6% in the upper-secondary level.

At the tertiary level, the situation is even worse. In 2023, only 5.3% of people within the age group were enrolled in tertiary institutions in Mauritania, and this will only improve to about 13.7% by 2043 in the Current Path. Worryingly, only 5.3% of the relevant age group in Mauritania graduated from a tertiary institution with at least a first degree in 2023. This will steadily rise to 9.6% by 2043.

Enrolment in vocational training and science and engineering education, which are essential for the future of work, is fairly low. Vocational training is a key element in meeting labour market needs, improving workers' skills and promoting the employability of young people. In 2023, 1.5% of upper-secondary students were enrolled in vocational training programs in Mauritania, and this figure is expected to remain steady until 2043. This is far below the average rate of 13.2% for lower-middle-income countries in Africa. At tertiary level, by 2023, 24% of Mauritania's tertiary graduates will be enrolled in science and engineering programs, which is higher than the 15.1% rate for lower-middle-income countries in Africa. In the Current Path, Mauritania's progression rate will reach 22.6% in 2043.

In 2023, 105.4 females were enrolled in primary school for every 100 males in Mauritania compared to the 99.6 females to 100 males average of lower-middle-income countries in Africa. At the secondary level, there were 41.0 females enrolled for every 100 males in Mauritania, as opposed to the average of 57.3 females for every 100 males in African lower-middle-income countries. At the tertiary level, there were 3.8 female students for every 100 male students, compared to the average of 15.4 female students for every 100 male students for Mauritania's income-group peers on the continent.

Using the average test score as a proxy for quality of education, Mauritania's performance varies compared to that of its income peers in Africa. In 2023, the average test score for primary education stood at 15 out of 100, compared to 28.4 out of 100 for the African lower-middle-income countries. At the secondary level, the average test score stood at 30.9 out of 100, above the average of 37.3 recorded for the African lower-middle-income countries. This likely reflects challenges with teacher training deficiencies, high absence rates among students who are enrolled, and schools that are poorly equipped to meet the basic needs of the students

In the Current Path, this trend will continue. Thus, although Mauritania has tried to improve its education system,

significant qualitative challenges still need to be addressed.

Chart 17: Mean years of education in the Current Path and Education scenario, 2020-2043  
15 to 24 year age group

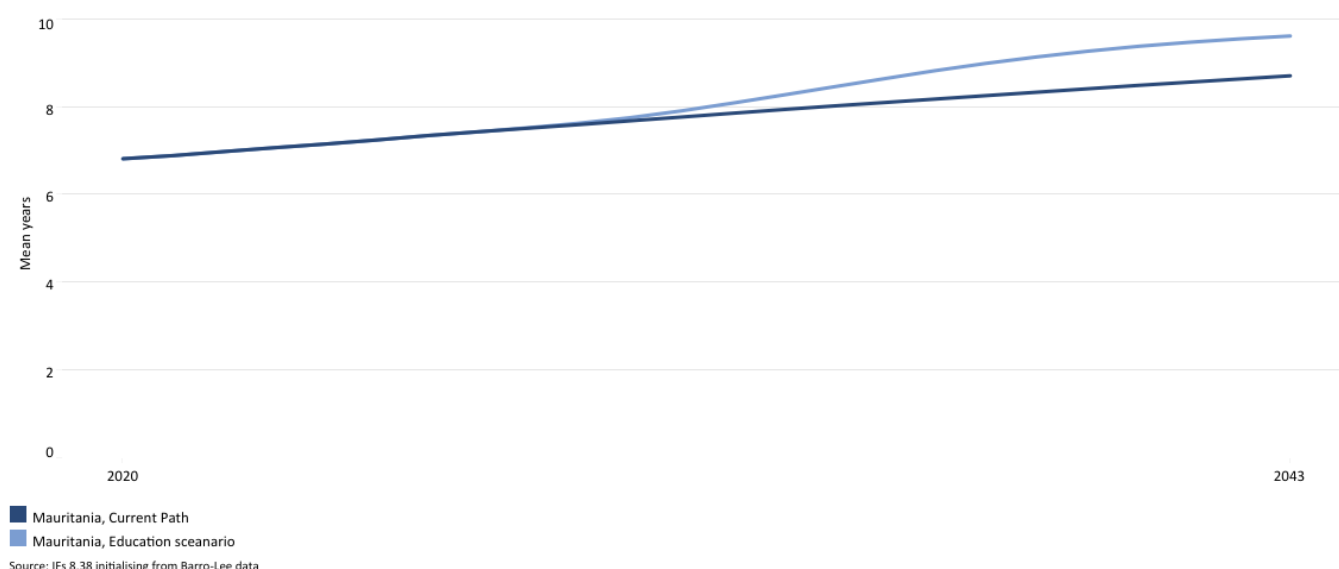


Chart 17 presents the mean years of education in the Current Path and in the Education scenario, from 2020 to 2043, for the 15 to 24 age group.

The average years of education in the adult population aged 15 to 24 is a good first indicator of how the stock of knowledge in society is changing.

The average number of years of education of the adult population aged 15 to 24 is a good first indicator of the evolution of the stock of knowledge in society. In 2023, the average number of years of schooling achieved by adults aged 15 to 24 in Mauritania was 7.1 years, below the average of 7.8 years for African lower-middle-income countries. Women's years of schooling (6.9) are slightly lower than those of males (7.2). In the Current Path, the average Mauritanian aged 15 to 24 will have received 8.7 years of schooling by 2043.

In the Education scenario, the average number of years of adult education will rise to 9.6 by 2043, 0.9 years more than in the Current Path in the same year. The Education scenario increases average primary school results to 22.6% in 2043, compared to 20.9% in the Current Path in the same period. At the secondary level, the average results of Mauritania students will reach 36.7% in 2043, slightly above the 34.4% of the Current Path. This means that the Education scenario has the potential to improve the quality of education (reflected in test results).

## Manufacturing scenario

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

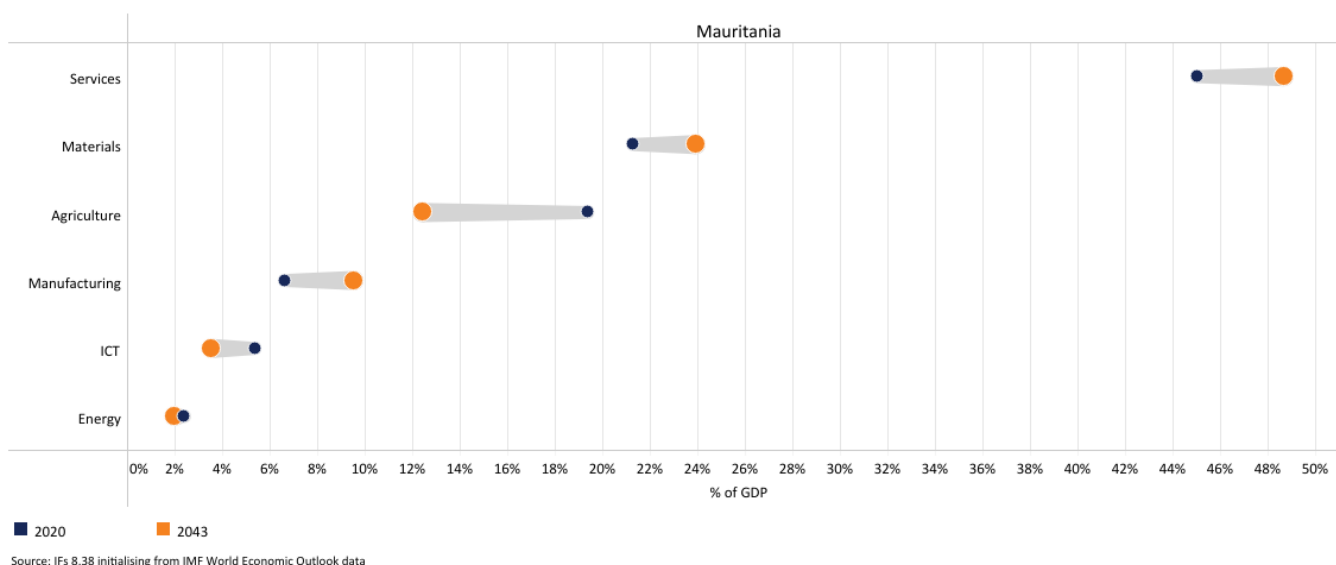


Chart 18 presents the value-add by sector as share of GDP in the Current Path, for 2023 and 2043.

In the Manufacturing scenario, 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 total labour

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

The manufacturing sector is crucial for the productive transformation of a country's economy towards sustained high growth, employment creation and improved prosperity. It has backward and forward linkages with other sectors, such as the agriculture and service sectors. In Mauritania, this sector, although full of potential, remains marked by persistent challenges and dependence on extractive industries. The manufacturing sector in Mauritania, while significant in the economy, is relatively **small** and contributes around 8% to the country's GDP. Mauritania's manufacturing sector **consists** mainly of the processing of local products, particularly agri-foodstuffs, and the manufacture of import-substitute goods and dominated by the extractive industries (iron, gold, hydrocarbons). It is made up of formal small and medium-sized enterprises (SMEs), often located in Nouakchott and Nouadhibou, as well as a large number of informal micro and small enterprises (MSEs).

In 2023, the services sector in Mauritania contributed US\$3.6 billion to the economy, equivalent to 44.9% of GDP. This is followed by the contribution of the materials sector (which includes mining) with US\$1.8 billion, equivalent to 21.0% of GDP. The agriculture sector contributed US\$1.7 billion, representing 19.6% of GDP in 2023. The manufacturing sector was valued at US\$572.5 million, equivalent to about 6.8% of GDP. The contributions of the information and communications (ICT) and energy sectors were valued at US\$424.0 million (5.0% of GDP) and US\$203.3 million (2.4% of GDP), respectively.

The low level of diversification in manufacturing is limiting the creation of added value, with a marked shortage of skilled jobs: only 12% of SMEs have access to credit, and the literacy rate (30-50%) is holding back innovation. To improve the current trend, Mauritania has introduced a number of strategic reforms. These include the SCAPP Strategy (2016-2030),

which aims to diversify the economy through public-private partnerships and improving the business climate. The **Investment Promotion Agency (APIM)**, created in 2021, has considerably reduced the time required to set up a business to 48 hours, attracting a large number of investments in the mining and energy sectors. In addition, the **Green Hydrogen Law**, adopted under the aegis of the Ministry of Petroleum, Mines and Energy, is in line with the country's energy transition ambitions. The law provides tax incentives and an attractive regulatory framework for partners such as the European Union and the Agence Française de Développement, positioning Mauritania as a potential leader in clean energy in Africa.

In the Current Path, the services sector will extend its dominance in the economy and, by 2043, reach US\$8.2 billion (48.7% of GDP). The material sector will remain the second-largest contributor over the forecast period. Its contribution will grow to US\$4.0 billion (equivalent to 23.9% of GDP) by 2043. The contribution of agriculture to GDP in Mauritania will decrease to constitute 12.4% (valued at US\$2.1 billion) of GDP by 2043. The energy sector will contribute 2.0% by 2043. The contribution of ICT will reach 3.5% by 2043. There are still many obstacles to overcome high-energy costs (despite untapped solar potential), poor infrastructure and a low-skilled workforce. Mauritania suffers from a historically extractive economy and limited innovation.

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

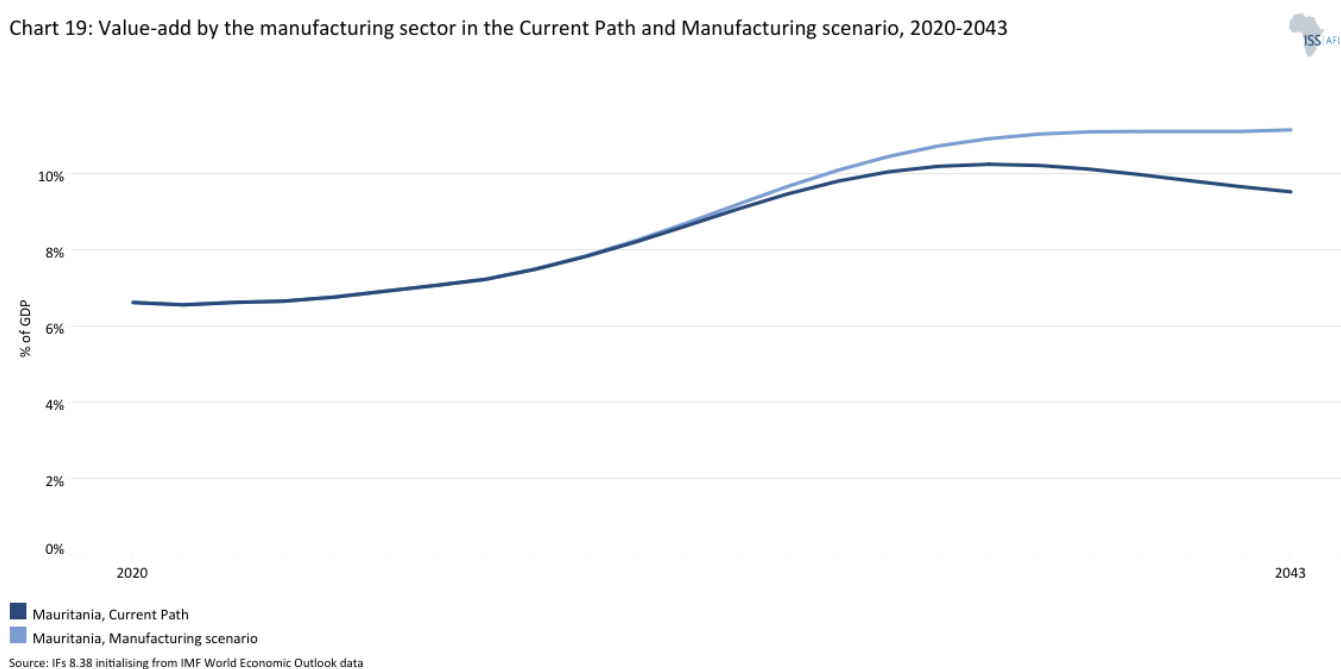


Chart 19 presents the contribution of the manufacturing sector to GDP in the Current Path and in the Manufacturing scenario, from 2020 to 2043. The data is in US\$ and % of GDP.

In the Manufacturing scenario, Mauritania makes progress in industrialisation compared to the Current Path. By 2043, the share of the manufactures sector in GDP will be 11.2% (US\$2.0 billion), about 1.5 percentage points of GDP above the Current Path. It means that an aggressive manufacturing transition can add an extra US\$400 million above the Current Path to the economy of Mauritania.

## AfCFTA scenario

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

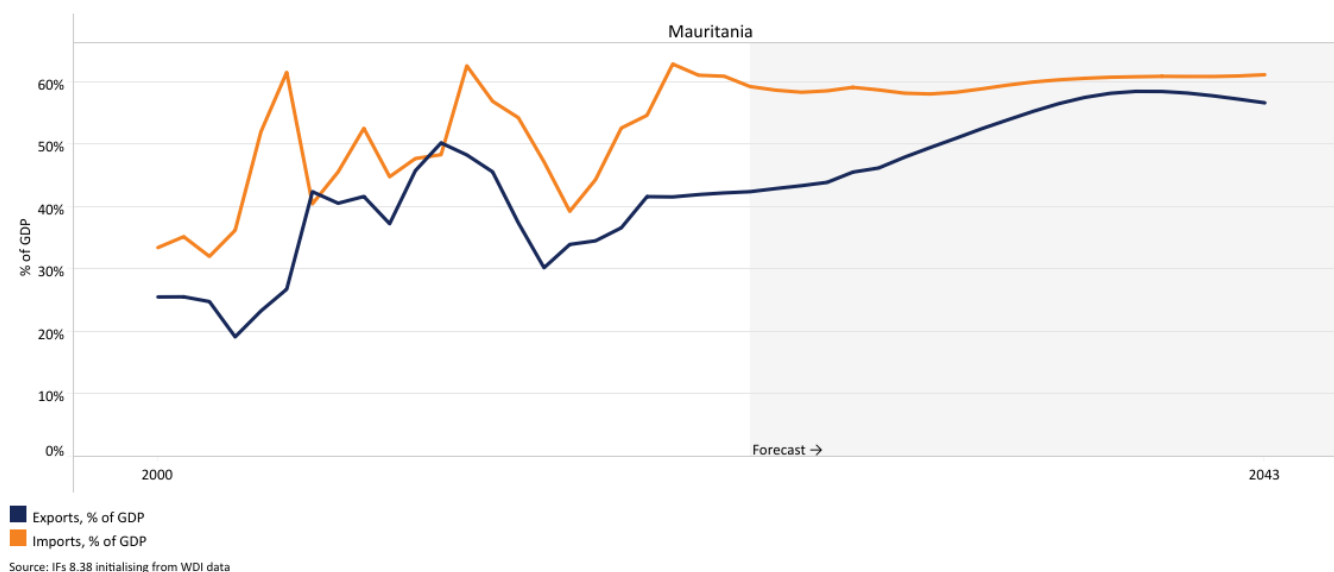


Chart 20 depicts exports and imports as a percentage of GDP, from 2000 to 2043, in the Current Path and in the AfCFTA scenario.

The AfCFTA scenario represents 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.

Historically, Mauritania's economy has been more open to international trade than that of many countries in the region. In 1990, the sum of Mauritania's exports and imports stood at 78.1% of GDP, which was far above the average of 48.2% for African lower-middle-income countries. By 2023, trade openness in Mauritania had jumped to 101.6% of GDP, still far above the 46.7% average for African lower-middle-income countries. In the Current Path, this trend will increase to reach 117.7% of GDP by 2043, far above the average 56.0% of GDP of its income peers.

This performance in international trade is partly attributable to Mauritania's commitment to a trade policy that promotes a diversified and resilient economy. The country actively participates in organisations such as the World Trade Organisation (WTO) and has signed several regional agreements to promote intra-African trade. Mauritania has been a member of the WTO since 31 May 1995 and signed the African Continental Free Trade Area Agreement (AfCFTA) in March 2018, which was ratified in January 2021, enabling it to trade goods and services throughout the region on preferential terms.

Mauritania has experienced significant growth in exports. In 1990, the total volume of exports amounted to US\$1.0 billion, or 36.1% of GDP, dominated mostly by iron ore (65%) and fish (25%). By 2023, exports had reached US\$3.4 billion, representing 42.3% of GDP, double the average of 20.8% of GDP for African lower-middle-income countries. This trend is largely driven by gold (36.2%), iron (35.3%) and fishery products (19.9%), copper (3.4%) and others (5.2%). Europe is the leading trading partner, absorbing 33.3% of foreign trade. Spain (29.4%), Belgium (17.5%), France (13.3%), Switzerland (10.5%), Italy (6.1%) and the Netherlands (5.2%) are Mauritania's main European partners. These countries account for

82.1% of European trade with Mauritania. Asia, with 25.6% of trade in 2023, remains the second partner. Trade goes mainly to China (58.7%), Japan (10.8%), Indonesia (7.4%) and Malaysia (6.9%). The American continent accounts for 16.4% of the total value of trade. Trade is with Canada (67.9%), Brazil (15.4%) and the United States (13.0%). Africa's internal share of trade in 2023 was estimated at 12.2%. The main trading partners are Algeria (40.0%), Morocco (21.3%) and Côte d'Ivoire (6.9%). The Middle East accounted for 12.6% of trade in 2023.

Mauritania's total imports grew from US\$1.2 billion, equivalent to 41.9% of GDP in 1990 to US\$4.8 billion, representing 59.2% of GDP, in 2023. This was higher than the estimated average of 25.9% for African lower-middle-income countries in the same year. In the Current Path, total imports to Mauritania will reach US\$10.2 billion (61.1% of GDP) by 2043. The main import partners are Canada (US\$747 million), China (US\$437 million), Switzerland (US\$230 million), Algeria (US\$187 million), Italy (US\$100 million), Australia (US\$80 million) and Côte d'Ivoire (US\$52 million).

The prevalence of mining in the Mauritanian economy presents opportunity for growth, especially given that much of the materials exported are unprocessed ore. The country likely has a high comparative advantage in iron extraction that could be used to foster industries such as ore refinement, steel production and steel fabrication to grow and diversify the economy. This shift to value-add industries and exports would also fortify the Mauritanian economy against the volatile world of global commodity prices. In the process, the country still faces a number of challenges in strengthening its competitiveness on the international market. These include the need to improve trade and logistics infrastructure, as well as encouraging more foreign investment in key sectors such as agriculture and technology. In addition, it is essential to improve the business climate in order to attract potential investors.

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

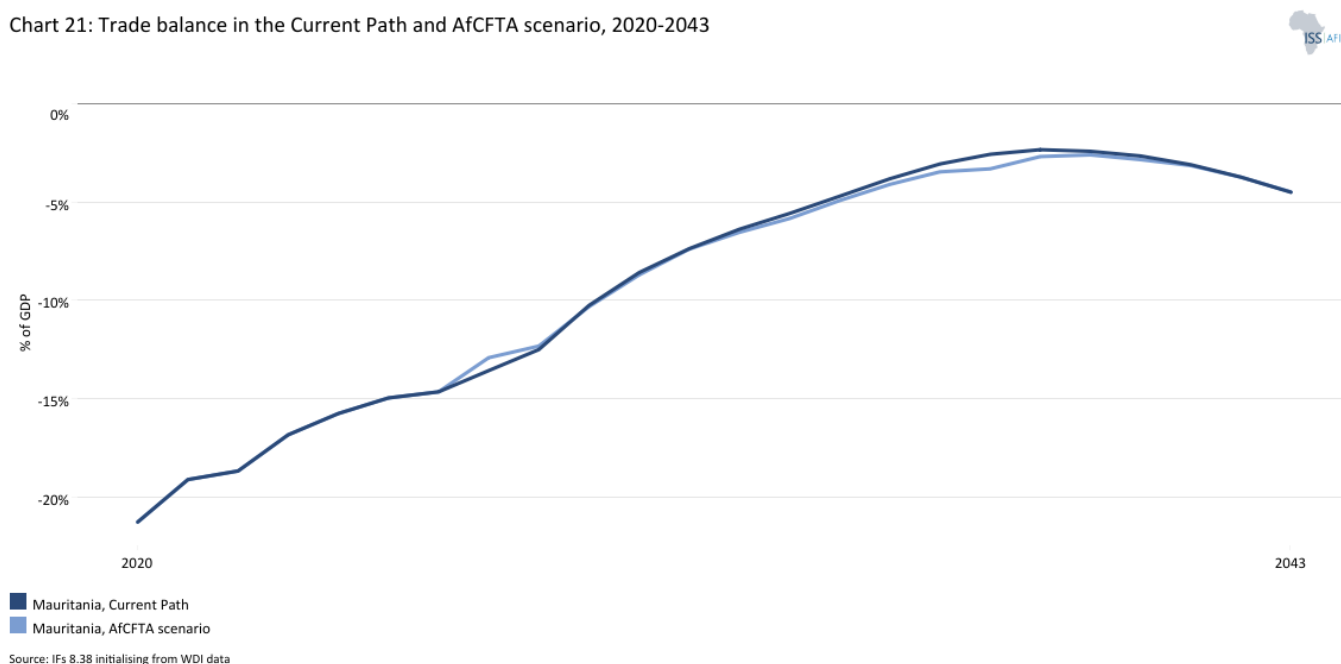


Chart 21 presents the trade balance in the Current Path and in the AfCFTA scenario, from 2020 to 2043 as a percentage of GDP.

Mauritania has a deficit in its trade balance. Like most African countries, it imports large volumes of mostly finished or processed goods. Its export quantities are small, and mostly comprise raw materials, with little or no value addition occurring within the country. This results in low export revenues and higher import expenditures. Mauritania's trade deficit in 2023 constituted 16.8% of GDP, which was far above the average of 5.1% for LMICs in Africa.

In the AfCFTA scenario, the sum of Mauritania's exports and imports as a percentage of GDP will reach 115.5% by 2043,

slightly below its Current Path. This is due to a slight drop in imports compared with the Current Path. In addition, the AfCFTA scenario will reduce the trade deficit to 4.4% of GDP in 2043 compared to 4.5% of GDP in the Current Path. This means that Mauritania could improve its deficit by almost 0.1 percentage points of GDP in the Current Path.

## Large Infrastructure and Leapfrogging scenario

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

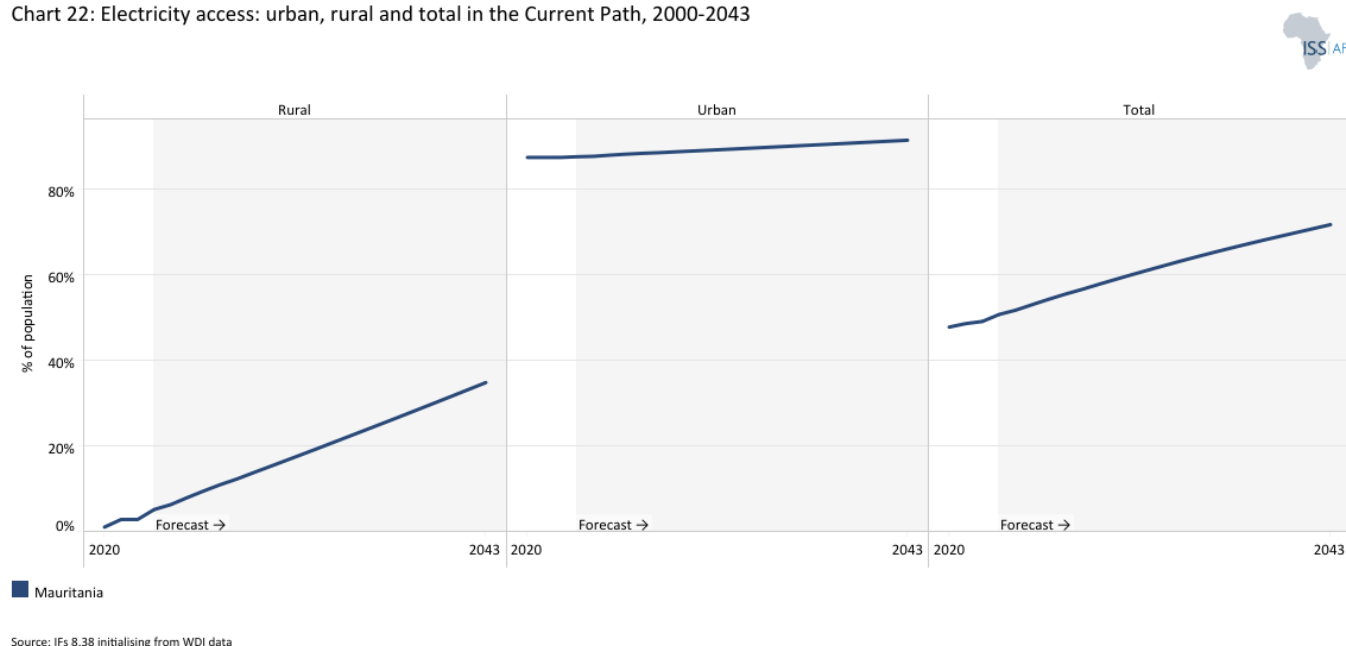


Chart 22 presents the Current Path of access to electricity for urban, rural and the total population from 2000 to 2043.

The Large Infrastructure and Leapfrogging scenario 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 incorporates significant investments in major infrastructure projects like rail, ports and airports (other infra) while highlighting the positive impacts of renewables and ICT.

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

Infrastructure development is crucial for economic growth and diversification. **Modern infrastructure** can improve productivity, augment healthy lifestyles, boost educational outcomes and facilitate government effectiveness. In this study, we focus on both physical and digital infrastructure, including roads, electricity access and ICT.

Mauritania's significant investments in public infrastructure in the 1990s contributed to the development of the economy and improved the stock of public capital. The Africa Infrastructure Development Index (AIDI) consists of four composite indicators: transport, electricity, ICT, and water supply and sanitation needs. Mauritania does not consistently appear in the top AIDI positions, and better developed countries like Seychelles, Egypt and Libya have high rankings. In 2023, Mauritania was ranked 127th in the Global Innovation Index (GII) and its infrastructure ranking was 124th out of 132 countries.

Physical infrastructure, such as roads and railways, is a critical driver of economic growth and an important component of development. It facilitates the movement of people, goods and services, promotes intra-country trade and serves as an enabler of social service provision such as education and health. In 2023, the total length of roads in Mauritania was estimated at 13 207 km of which 34.0% was paved. This figure is below the average of 37.8% for LMICs in Africa. In the Current Path, the total road network in Mauritania will rise to 24 297 km by 2043, with paved roads as a percentage of total roads constituting 37.5%, still far below the average 61.5% for LMICs in Africa.

Mauritania draws its energy from a variety of sources, but oil remains the dominant source, covering over 70% of the country's energy needs. However, the country has significant potential in renewable energies, notably solar and wind power, which account for a growing share of the energy mix. Hydroelectricity and biomass are also used, albeit to a lesser extent.

As part of its national strategy to ensure universal access to electricity by 2030, the country has launched several programs in collaboration with international partners, including the production of electricity from renewable energies, the development of green and blue hydrogen and the establishment of a national high-voltage distribution network. In addition, the restructuring of the national electricity company is underway, with public-private partnerships to improve the sector's efficiency.

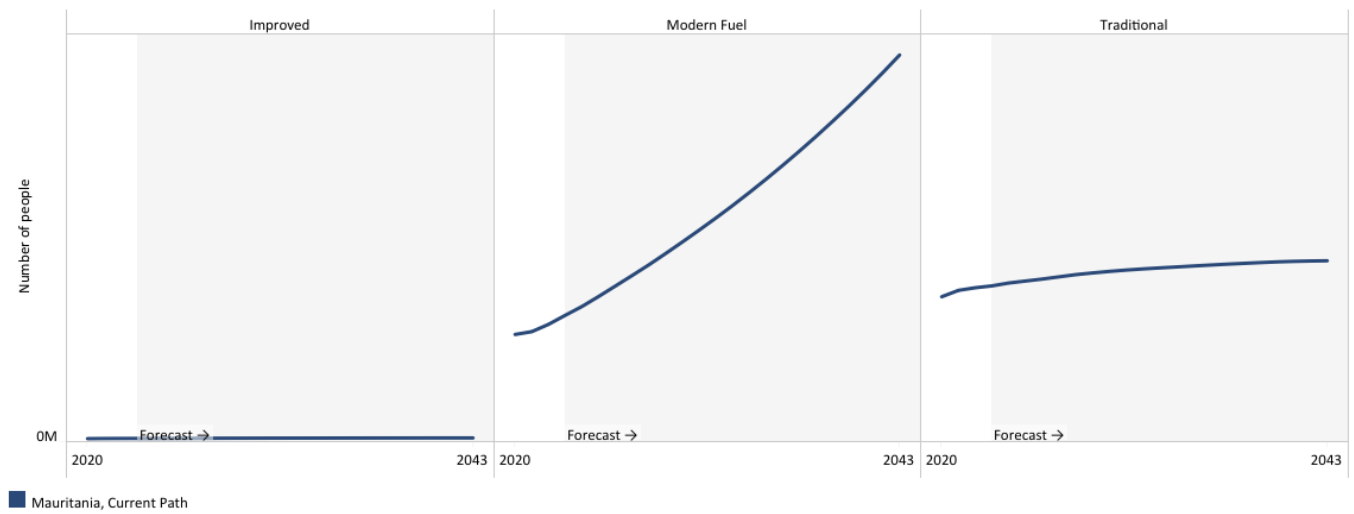
In 2023, an average of 50.7% of Mauritians had access to electricity, far below the average of 68.9% for LMICs in Africa. Faced with such an electricity deficit, the country has announced the development of two rural electrification projects: one aimed at developing solar power plants and electrical connectivity with neighboring Mali, to provide 600 megawatts of electricity between the two nations; the other to provide electricity to 40 towns and villages in south-eastern Mauritania, in order to stimulate economic activity and improve the quality of life of the inhabitants. In the Current Path, access to electricity in Mauritania will increase to 71.7%, remaining below the average of 82.4% for LMICs in 2043.

The Digital Economy covers the production, distribution and consumption of goods and services related to telecommunications and Information and Communication Technologies. A National Agenda for Digital Transformation 2022-2025 has been launched to guide these efforts. It focuses on modernising the administration, developing the ICT infrastructure, promoting the digital economy, digital inclusion and developing an appropriate legal framework. The aim is to simplify and digitalise government services and business support services.

In 2024, on the International Telecommunication Union's Information and Communication Technology (ICT) Development Index, Mauritania ranked 139th globally and 21st in Africa for ICT development, with a score of 55.5 points. In 2023, Mauritania had a mobile broadband subscription rate of 70.9 per 100 people, above the average of 62.6 for African lower-middle-income countries. In the Current Path, mobile broadband subscriptions will rise to 150.5 per 100 people in 2043, remaining above the average of 148.9 for its income-group peers. In 2023, the total number of fixed broadband subscriptions in the country was about 2.8 per 100 people, below the average of 3.7 per 100 people for its income-group peers. In 2023, Mauritania had an internet penetration rate of 58.8% of the total population, with 2.82 million internet users.

In the Current Path, fixed broadband subscriptions will rise to 20.7 per 100 people by 2043, below the average of 21.1 subscriptions per 100 people for its income-group peers. Although the country has embarked on a digital transformation, the lack of digital infrastructure, the low level of ICT adoption, the lack of digital skills and the risks associated with digital security and governance remain the main challenges it faces.

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



Source: IFs 8.38 initialising from WDI data

Chart 23 presents the number of people using cookstoves in the Current Path and in the Large Infrastructure and Leapfrogging scenario, from 2020 to 2043.

Our analysis distinguishes between three types of cookstove: traditional, improved and modern. In 2023, 54.6% of households in Mauritania used traditional stoves with firewood or charcoal for cooking, while 1.1% used improved cookstoves and 44.3% used modern stoves. Although the majority of the Mauritania population still uses traditional stoves for cooking, there is a significant proportion of Mauritians who are already using modern stove, which helps to reduce pollution and carbon emissions, and has lowered negative impacts on the health of these households.

In the Large Infrastructure and Leapfrogging scenario, 73.3% of Mauritanian households will be using modern fuels for cooking in 2043, above the average of 70% for LMICs and above 67% in the Current Path by 2043. Increasing the use of modern furnaces should enable Mauritania to reduce environmental stress and biodiversity loss. They can also be better ventilated, which, combined with cleaner fuels, will lead to fewer respiratory illnesses in women and children, who are most seriously affected by the harmful effects of prolonged smoke inhalation at home.

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

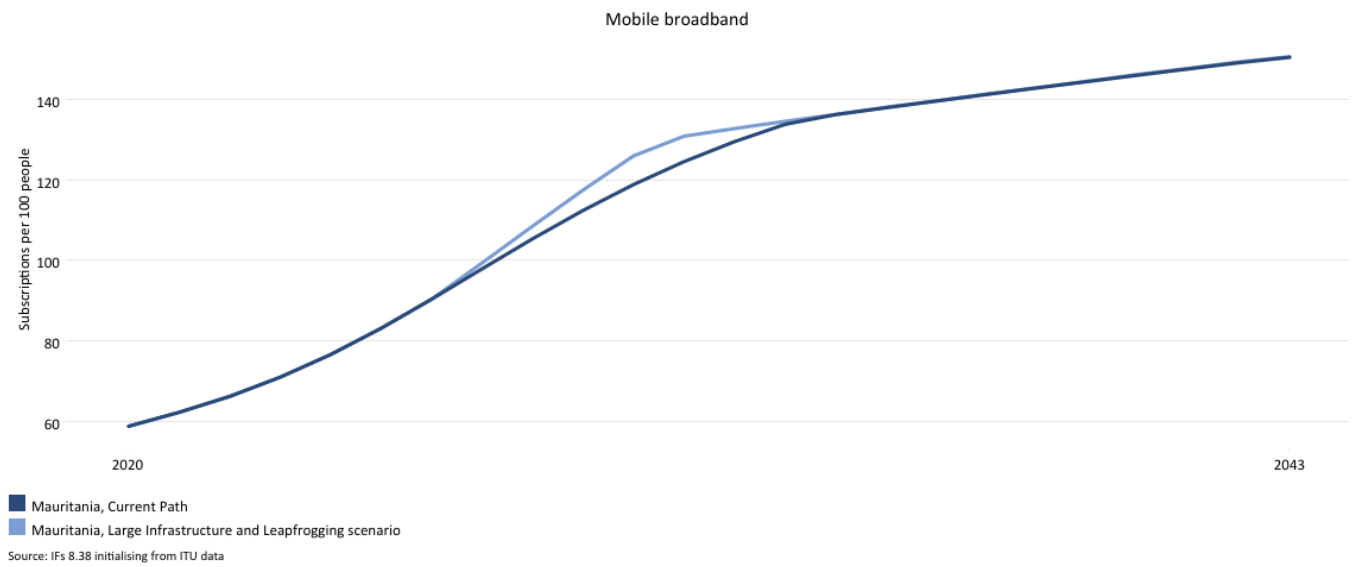


Chart 24 presents the percentage of the population and number of people with access to mobile and fixed broadband in the Current Path and in the Large Infrastructure and Leapfrogging scenario, from 2020 to 2043. The user can toggle between mobile and fixed broadband.

In the Large Infrastructure and Leapfrogging scenario, access to fixed broadband will rise to 23.9 per 100 people subscriptions by 2043, compared to 20.7 in the Current Path. The number of subscriptions to mobile broadband will reach 150.7 per 100 people by 2043 in the Large Infrastructure and Leapfrogging scenario, compared to 150.3 per 100 people subscriptions on the Current Path.

## Financial Flows scenario

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

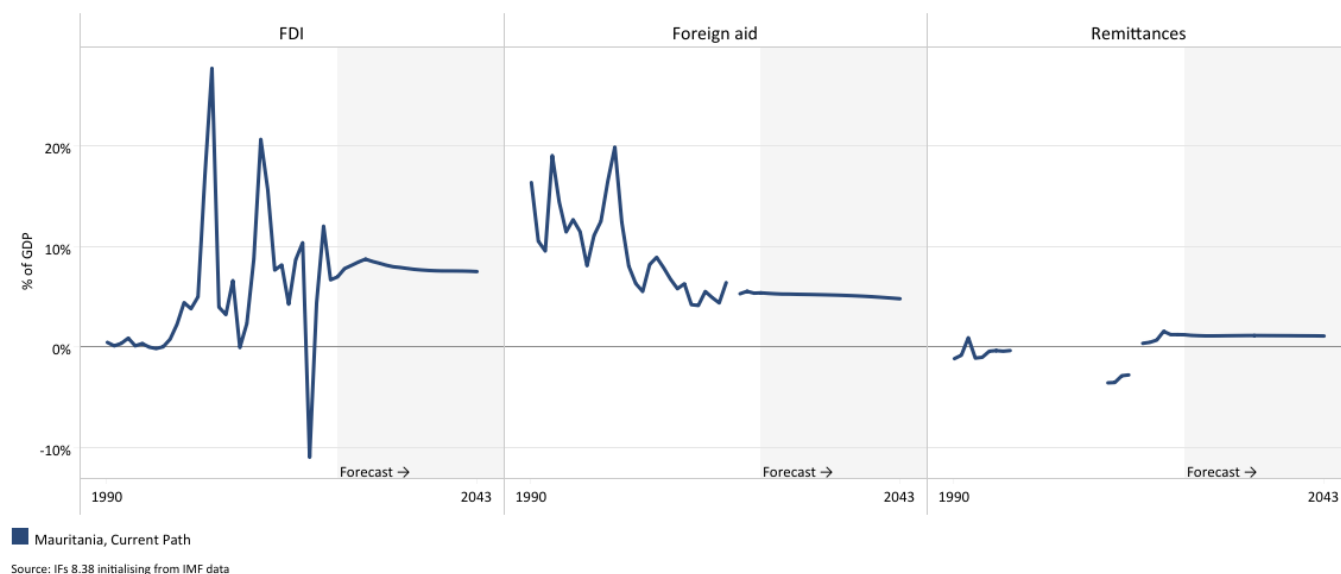


Chart 25 presents the trends in FDI, aid and remittances in the Current Path and in the Financial Flows scenario as a percentage of GDP, from 1990 to 2043.

The Financial Flows scenario 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.

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

Historically, Mauritania **has oriented** its economy around natural resources, the 2000s being a critical period when the state endeavoured to attract foreign investment. Today, mining activities (iron ore, gold) and energy (gas, renewables) drive financial flows. In 1990, the total foreign direct investment (FDI) inflow to Mauritania was equivalent to 0.4% of GDP, below the average of 0.7% of GDP for LMICs in Africa. By 2023, FDI inflows to Mauritania reached 6.9% of GDP. The primary FDI partners of Mauritania **are** France, China, the United Arab Emirates and Canada. France historically has had strong economic and political ties with Mauritania and is a major investor, with a significant number of French companies operating in the country. China, the UAE and Canada also contribute significantly to Mauritania's FDI inflows, with China **showing** increasing interest in recent years.

This increase is **due** to the government's determination to facilitate foreign investment by guaranteeing the free repatriation of capital and salaries of foreign employees, and by offering tax benefits. Indeed, the investment climate, governed by the 2021 **Investment Code**, offers tax exemptions (5 years in remote areas), guarantees of capital transfer and a single window through the Investment Promotion Agency (APIM), reducing business registration to 48 hours. Mauritania has also joined the Extractive Industries Transparency Initiative (EITI), which has raised investor confidence. In the Current Path, FDI inflows are expected to marginally rise to 7.5% of GDP by 2043. This figure will be above the average of 3.5% for lower-middle-income countries in Africa.

**Net official development assistance** (ODA) consists of disbursements of loans made on concessional terms (net of

repayments of principal) and grants by official agencies of the members of the Development Assistance Committee (DAC), by multilateral institutions, and by non-DAC countries to promote economic development and welfare in countries and territories in the DAC list of ODA recipients. In 1990, the total ODA received by Mauritania constituted 16.3% of GDP, compared to the average of 6.5% for LMICs in Africa. By 2023, total ODA as a percentage of GDP stood at 5.3%, equivalent to US\$435.1 million. This was far above the average of 1.5% for LMICs in Africa. In the Current Path, ODA will decline to 4.8% of GDP in 2043, although the absolute amount will increase to US\$801.7 million by 2043.

Remittances from migrants to Mauritania are an important aspect of the country's migration and economic development. These transfers are often made through traditional channels, and remain an important source of financing for families. In 1990, the total net remittance balance to Mauritania was negative valued at -US\$33.4 million, equivalent to -1.1% of GDP. By 2023, this had grown rapidly to US\$97.8 million, constituting 1.2% of GDP. Yet, this is below the average of 3.3% for LMICs in Africa. In Mauritania, remittance inflows primarily come from individuals working in China, Switzerland, France, Spain, Japan, Italy and the United Arab Emirates. While Mauritania is a net sender of remittances overall (outflows exceed inflows), the absolute volume of remittances is increasing. In the Current Path, the total net remittances balance will reach US\$181.5 billion (1.1% of GDP), below the average of 2.3% of GDP projected for LMICs in Africa.

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

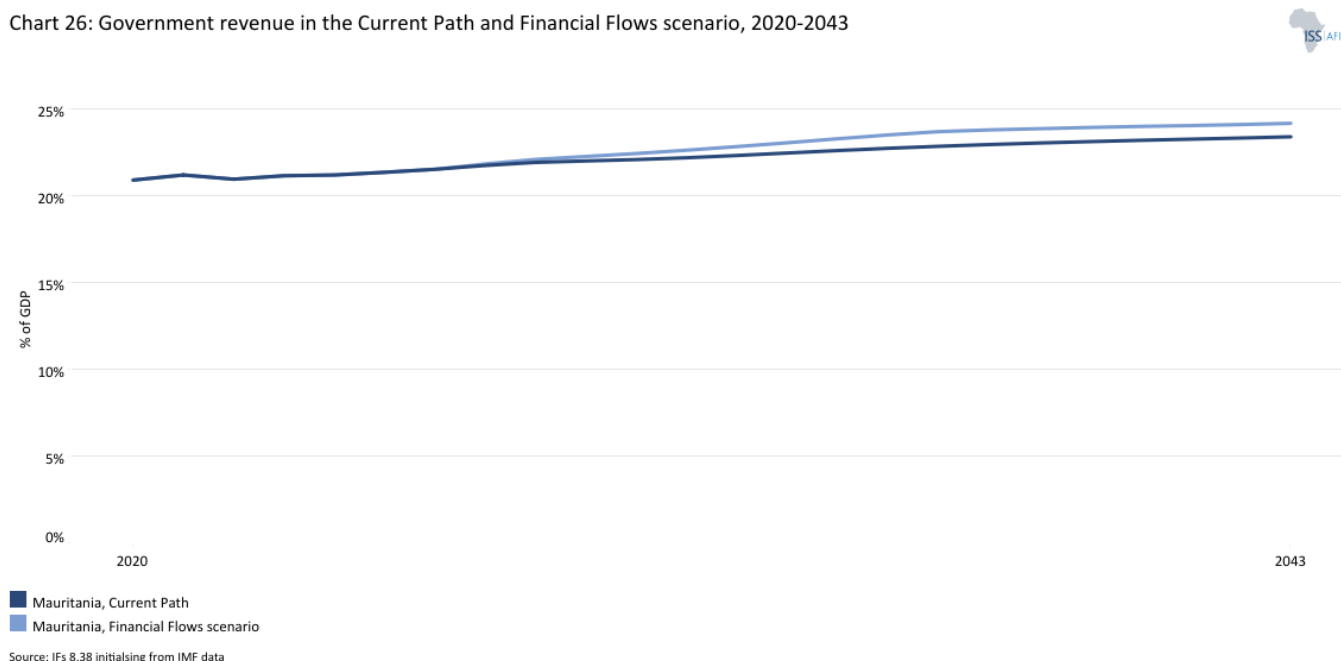


Chart 26 presents government revenue in the Current Path and in the Financial Flows scenario, from 2020 to 2043. The data is in US\$ 2017 and % of GDP.

Wagner's law, or the law of increasing state activity, states that public expenditure increases as national income rises. In the Financial Flows scenario, it is reasonable to expect that government revenues will increase as a percentage of GDP compared to the Current Path.

Structural transformation challenges facing Mauritania's government require increased financial funding. Theoretically, it is commonly accepted, according to [Wagner's Law](#), that public spending increases with national income. Intuitively, we can therefore expect an increase in public revenue as a percentage of GDP in the Financial Flows scenario, compared to the current trajectory.

In 2023, total government revenues in Mauritania stood at US\$1.7 billion, or 21.1% of GDP, which was higher than the average of 18% of GDP for LMICs in Africa. In the Current Path, total government revenues in Mauritania will be US\$3.9

billion, or 23.4% of GDP in 2043.

In the Financial Flows scenario, government revenue will rise to US\$3.9 billion in 2043, representing 23.4% of GDP, above the average of 21.4% for LMICs in Africa in the same year. Compared to the Current Path, the Financial Flows scenario will improve Mauritania's government revenues by an extra US\$20.0 million in 2043. Thus, if the country pursues its policy of efficient management of its public finances, notably by strengthening its institutional capacity to provide quality, up-to-date statistics, manage public expenditure and guarantee greater budget transparency, the Financial Flow scenario will enable it to meet its debt challenges and the dual challenge of investment.

## Governance scenario

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

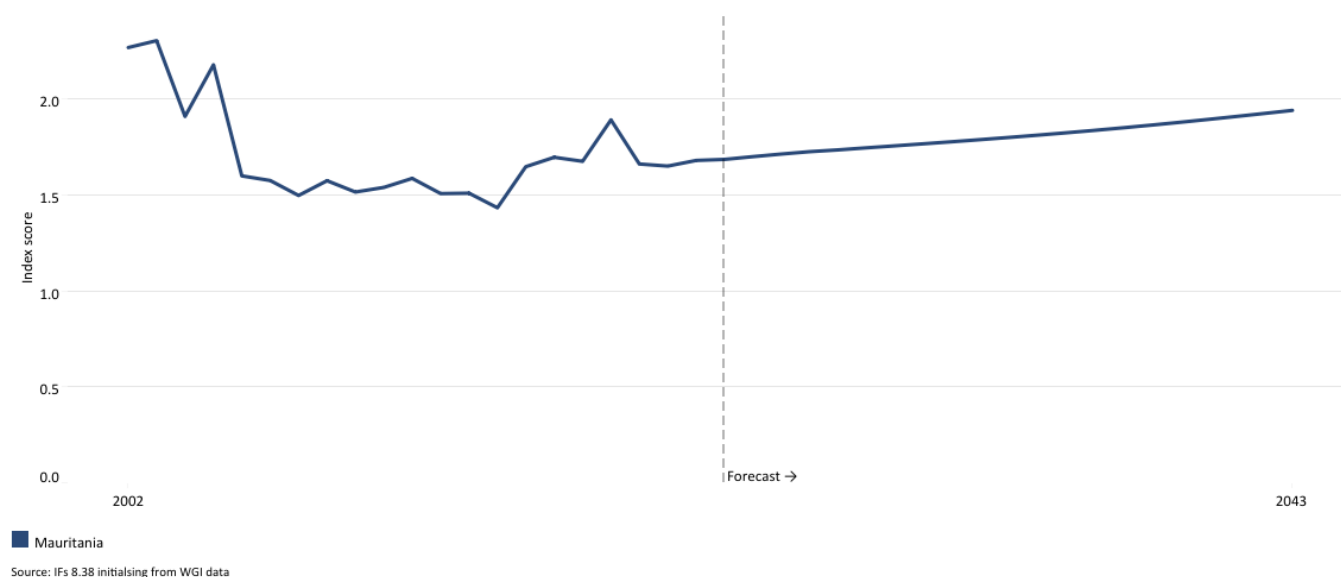


Chart 27 presents the Current Path of government effectiveness comparing the country to the average for the African income group, from 2002 to 2043.

The World Bank's [index](#) on government effectiveness captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation and the credibility of the government's commitment to such policies.

The World Bank's index on government effectiveness captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies.

Good governance is crucial for economic advancement. Enhanced national security and stability foster a favourable environment for both domestic and foreign investment, allowing governments to implement sustainable development strategies more successfully. In the 2023 [Ibrahim Index of African Governance \(IIAG\)](#), Mauritania scored 42.5 out of 100 in overall governance, placing it 41st out of 54 African countries. This score was below Africa's estimated average of 49.3 and the regional average for Northern Africa of 51.8.

The Corruption Perceptions Index is the leading global indicator of public sector corruption. In 2023, Mauritania had a score of 30, ranked 130th out of 180 countries. Mauritania's economic freedom score was 54.9, ranking it 119th out of 184 countries. This places it in the "mostly unfree" category. The score remained the same as the previous year.

In 2023, Mauritania scored a rank of 1.7 out of 5 for government effectiveness. This score is considered low, indicating a weak level of government effectiveness. In the Current Path, the governance effectiveness score will slightly increase to 1.9 out of 5 by 2043, below the average of 2.3 for LMICs in Africa in the same year.

While Mauritania's path shows a modest improvement in governance by 2043, the country still suffers from systemic

issues (corruption, exclusion, economic dependence). The experience of Seychelles, for example, where institutional integrity has allowed a leap in economic freedom (score of 66.4 in 2025) suggests that the answer is in thoroughgoing institutional reform, supported by international cooperation (IMF, World Bank) and a firm dedication to inclusion.

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

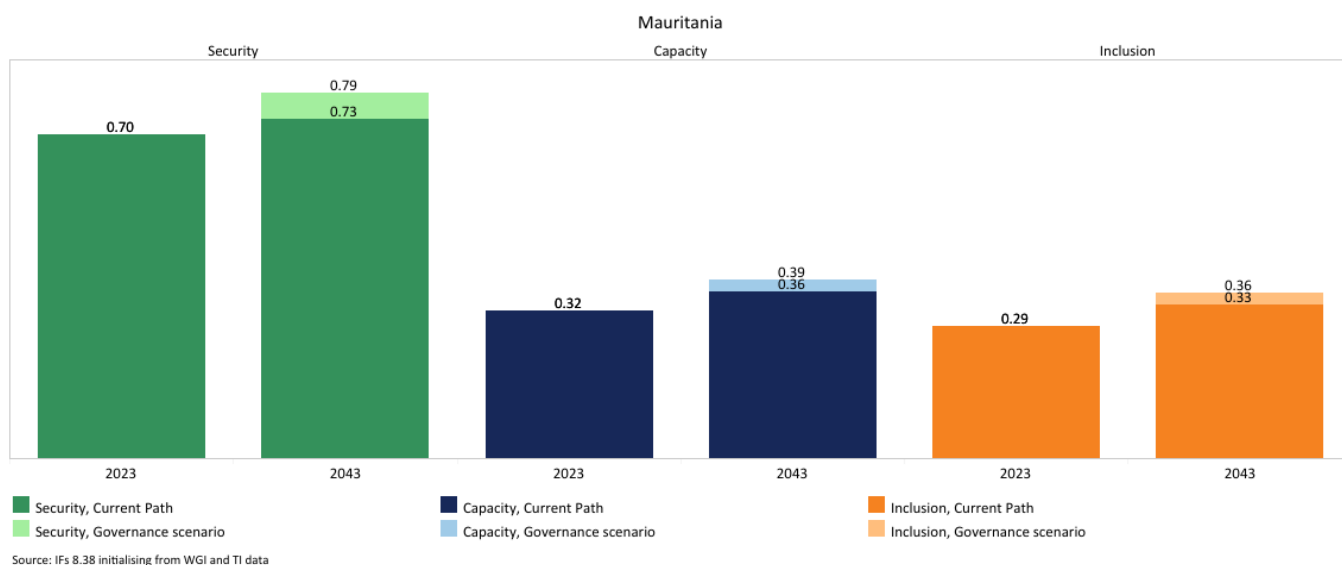


Chart 28 presents the security, capacity and inclusion index for the Current Path versus the Governance scenario, for 2023 and 2043.

This 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. participation rates, particularly among females where appropriate.

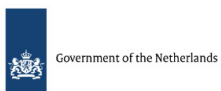
Note that the scenario includes increased welfare transfers to unskilled workers, which are paid for by taxes on skilled workers. Note: the two should roughly balance one another in US\$ terms. In the context of high poverty levels and inequality, social transfers have proven the most effective short/medium-term measures of alleviating both.

Visit the theme on [Governance](#) for a full conceptualisation and details on the scenario structure and interventions.

As in many African countries, the quality of governance remains a real challenge for Mauritania. In 2023, its score on the composite governance index stood at 0.43 out of 1, below the estimated average of 0.49 for LMICs in Africa. However, the decomposition of this indicator into its three dimensions of security, capacity and inclusion shows that the country has managed to improve its governance in terms of security (0.70), despite inclusion (0.28) and capacity (0.32) still remaining a real challenge.

In the Governance scenario, Mauritania's score on the governance security index will improve to 0.79 by 2043, slightly above the average of 0.7 for LMICs in Africa in the same year. Governance capacity will also improve in the Governance scenario, with its score increasing to 0.38 by 2043, constituting a 6.8% improvement above the Current Path in 2043. The governance inclusion index will improve in the Governance scenario by 6.0% compared to the Current Path in 2043. In the Governance scenario, Mauritania aims to improve its governance practices and the governance effectiveness is projected to rise to 2.18 by 2043, compared to the 1.94 to the Current Path.

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Pierre Christian Tsopmo (2026) Mauritania. Published online at [futures.issafrica.org](https://futures.issafrica.org). Retrieved from <https://futures.issafrica.org/geographic/countries/mauritania/> [Online Resource] Updated 11 September 2025.

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