Niger

Niger: Current Path

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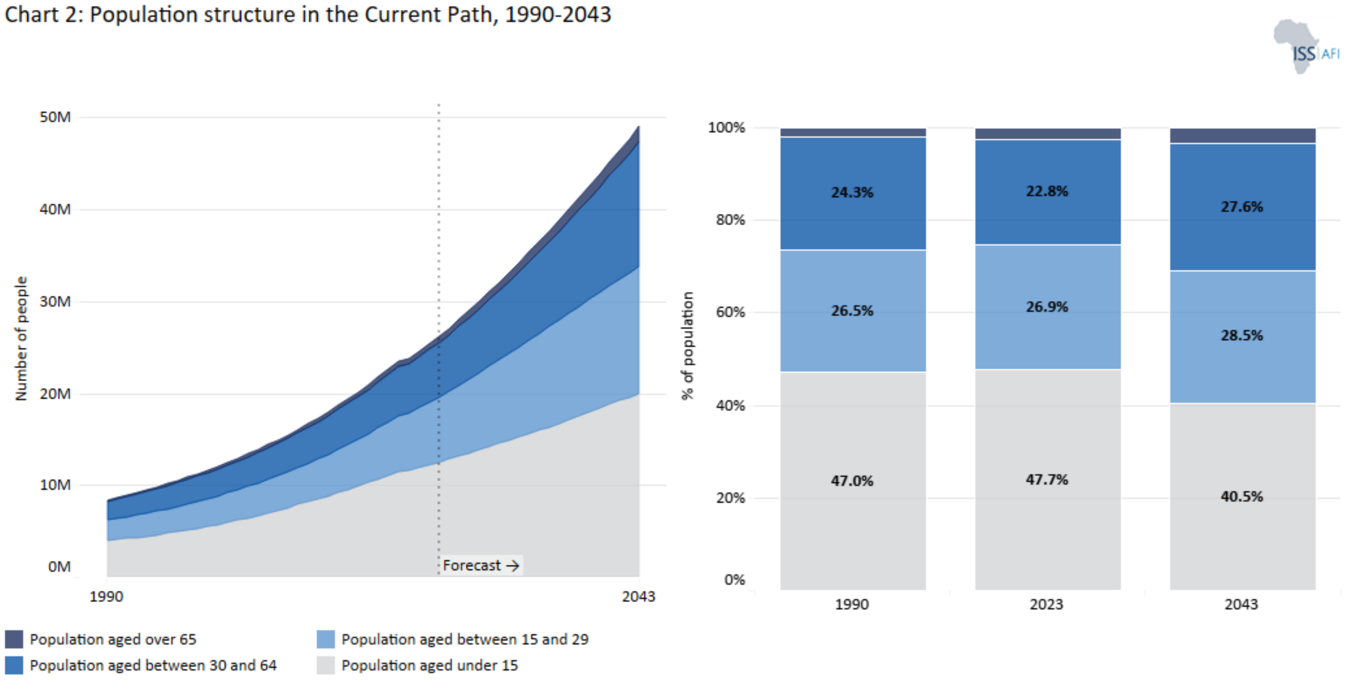
Chart 2: Population structure in the Current Path, 1990-2043



Source: IFs 8.34 initialising from UNPD population prospects estimate and WDI population data

Chart 2 presents the Current Path of the population structure, from 2020 to 2043.

Niger has one of the highest annual population growth rates globally, measured at 3.4% in 2023. Its exceptionally high fertility rate of 6.1 births per woman has driven rapid population growth, from 8.3 million in 1990 to 26.2 million in 2023, with our modelling forecasting 33.1 million by 2030 and 49 million by 2043. This growth poses significant challenges to sustainable development placing pressure on resources, infrastructure and social systems.

Adding to the complexity are strained social budgets due to competing demands arising from increased security spending linked to high regional instability. These budgetary pressures inevitably reduce allocations for long-term development sectors like health, education and social protection, further exacerbating the challenges of rapid population growth.

The high fertility rate, historically above 7 until 2017, is fueled by low contraceptive use and cultural norms favouring large families. In 2023, contraceptive use was just 12.7%, the 8th lowest globally. By 2030, this will rise to 18.9%, and by 2043, it will reach 29.9%, still one of the lowest rates worldwide. This low uptake will contribute to higher than global average fertility rates, which will stand at 5.4 births per woman by 2030 and 4.1 births by 2043.

A high fertility rate coupled with low levels of life expectancy means Niger had the world’s youngest population in 2023. Niger's median age was 16 years in 2023, with half of the population expected to be under 17 years by 2030. This youthful population, while contributing to a growing future labour force, also increases the dependency ratio, potentially limiting economic development. The median age of the population will reach 19.4 years by 2043.

Life expectancy in Niger will improve, from 64.8 years in 2023 to 69.2 years in 2030 and by 2043 would likely be 74 years, reflecting a strong positive trend. The elderly, those aged above 64 years, will remain a small part of the population, rising from 2.6% in 2023 to 3.4% by 2043. However, a potential demographic dividend will materialise only around 2060 when the ratio of the working-age population (15 to 64 years of age) to dependents (elderly and children) will get to 1.7 to 1. Until then, high dependency ratios will limit the contribution that labour can make to economic growth as well as to savings and investment.

Niger has a significant youth bulge, with 51.5% of the adult population aged between 15-29 years in 2023, the fourth largest globally. Despite a low youth unemployment rate of 0.4% in 2022, economic opportunities and political stability will be key to avoiding instability. The youth bulge will remain high throughout the forecast horizon amounting to 51.7% in 2030 and only dropping slightly to 47.9% by 2043. In the context of Niger, its large youth bulge, the limited economic opportunities afforded to young adults entering the job market, and the perceptions of the limited degree of political agency by young people contribute to instability.

The government should prioritize addressing these issues. It must focus on expanding access to education, creating jobs and facilitate employment opportunities, expand social grants and improve governance to harness the potential of its youthful population while minimising risks of social and economic instability through constant engagement.

Chart 3: Population distribution map, 2023

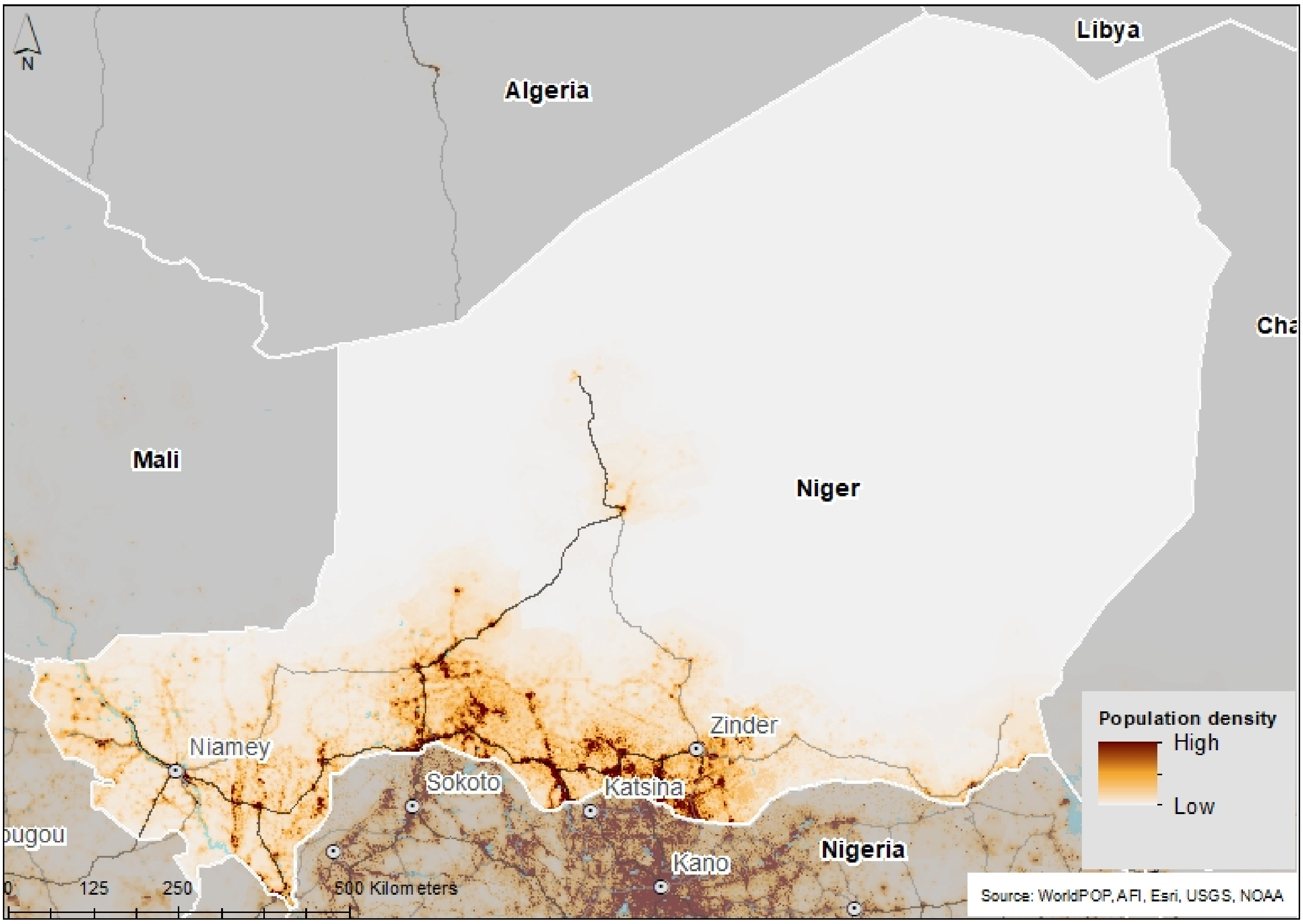


Chart 3 presents a population distribution map of Niger for 2023.

Niger's population of approximately 26 million is unevenly distributed, with most people living in clusters concentrated in the far south and west of the country. Due to its vast arid landscape—covering about 80% of the total land area—Niger has a low overall population density. An estimated 94% of the population resides on just 35% of the land, primarily in the more fertile southern regions along the border with Nigeria and around major river systems. The national average population density was 0.21 people per square kilometre in 2023 and will rise gradually to 0.26 by 2030 and 0.39 by 2043, reflecting slow urbanisation and the dominance of rural living.

Niamey, the capital and largest city, is situated in the southwest along the River Niger. It serves as the political, economic and cultural hub of the country, with an expanding urban footprint driven by population growth. Maradi, the second-largest city, and Zinder, the third-largest, are both located in the southern region near the Nigerian border, serving as important trade and agricultural centres.

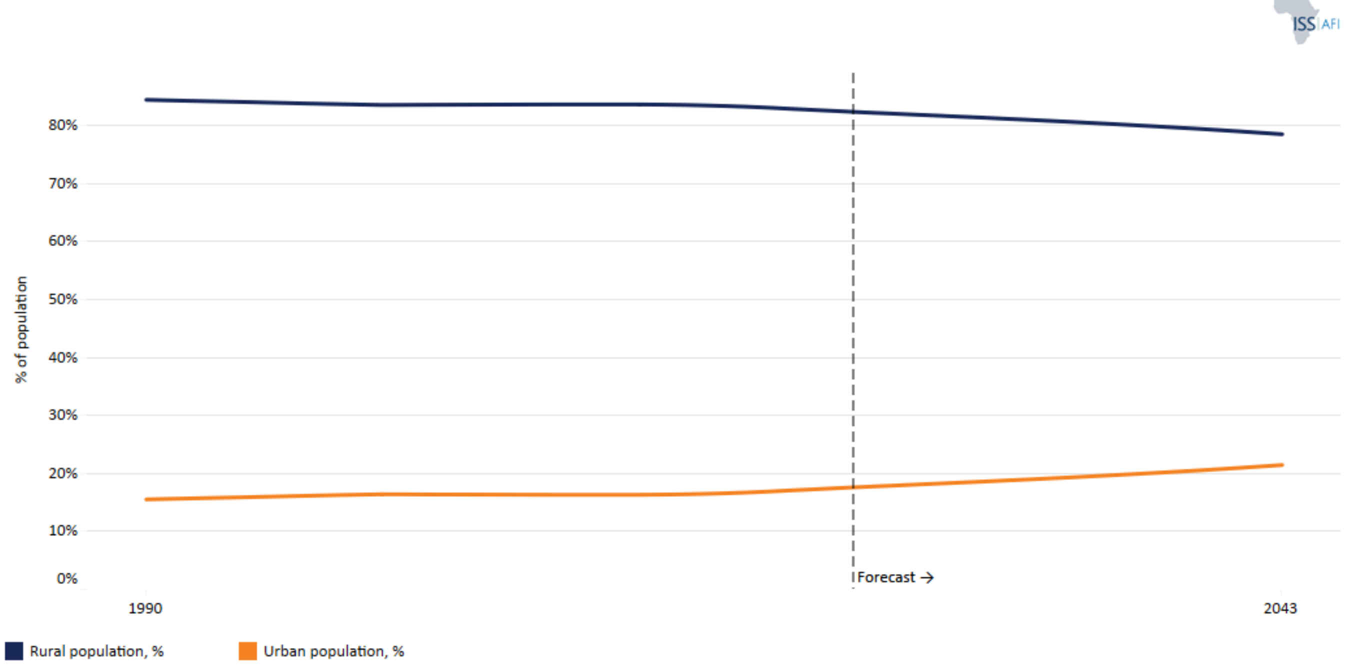
Despite its geographical isolation and limited connectivity, the city of Agadez in the north plays a critical role in linking Niger to Algeria via the Trans-Saharan Road (TSR) corridor and between Niger and Libya via the Salvador pass, which are key corridors for regional trade and migration.

The southern regions of Niger benefit from relatively better connectivity through major roadways, such as the Niamey-Cotonou Corridor and the Zinder-Kano Road. The Niamey-Cotonou Corridor, once a vital trade route linking the capital to Benin's port city of Cotonou, has been disrupted due to border closures following diplomatic tensions after Niger's 2023 coup and ECOWAS sanctions. Meanwhile, the Zinder-Kano Road continues to play a critical role in fostering economic ties with Nigeria, Niger's largest trading partner. Despite these important routes, the country's overall road infrastructure remains underdeveloped, with limited paved roads and poor maintenance, creating significant challenges for national connectivity and economic integration.

Niger's land use management is heavily influenced by its arid environment, with significant variations across regions. The country is divided into eight administrative regions—Agadez, Diffa, Dosso, Maradi, Tahoua, Tillabéri and Zinder—and the capital district, Niamey. These regions are further subdivided into 63 departments, a substantial increase from the 36 departments that existed prior to the administrative reorganisation implemented in 2011. Enhancing transport networks and upgrading key trade corridors are essential for improving connectivity between population clusters, unlocking economic opportunities, and supporting equitable development across the diverse landscapes of Niger.

Effective land use management in the southern areas would also be vital to ensuring sustainable agricultural practices, protecting fertile lands, and accommodating population growth in a way that balances development needs with environmental preservation.

Chart 4: Urban and rural population in the Current Path, 1990-2043



Source: IFs 8.34 initialising from UN World Urbanization Prospects data

Chart 4 presents the urban and rural population in the Current Path, from 1990 to 2043.

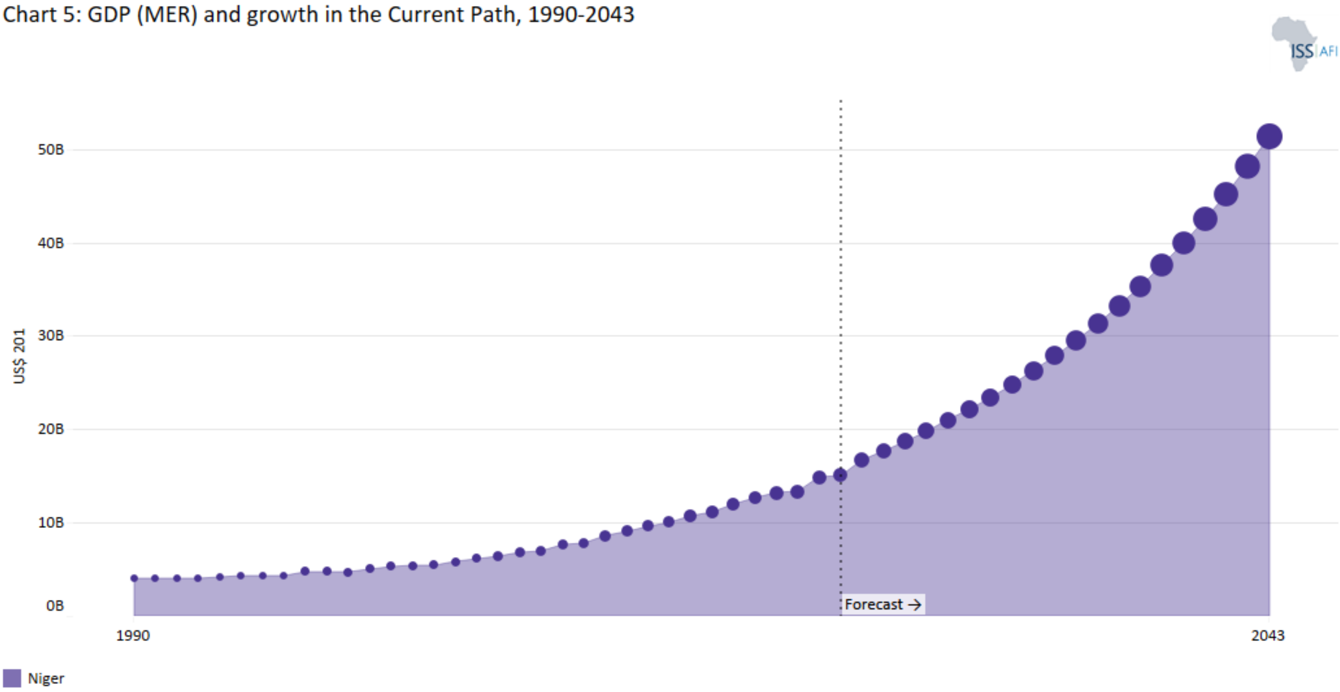
Niger is a latecomer to the global trend of urbanisation, with the vast majority of its population still residing in rural areas. In 2023, 82.4% of the population lived in rural areas, the third-highest rate globally, behind Papua New Guinea and Burundi. By 2030, the rural population proportion will drop marginally to 81.2%, and by 2043, it will reach 78.5%, still ranking 6th globally. This slow transition signals a prolonged reliance on agriculture and rural livelihoods, which may hinder the country's overall development if not accompanied by appropriate policy adjustments and infrastructure investments.

Urbanisation, when it occurs, can be a key driver of economic growth, as higher population densities in cities and towns foster entrepreneurship, increase productivity, and lead to higher rates of educational attainment and healthcare access. However, rural populations in Niger face persistent challenges due to limited access to critical services and infrastructure, including healthcare, education and reliable internet access, further deepening disparities.

More rapid rates of urbanisation could help address some of these disparities by offering better access to essential services and creating new economic opportunities - but only with prior planning and the pre-placement of infrastructure. It could present an opportunity for comprehensive urban planning reforms and climate adaptation strategies, particularly in the housing sector, which currently struggles with affordability and resilience to climate shocks. Nevertheless, this urban transition carries risks, such as the rapid and often uncontrolled expansion of informal settlements. These settlements frequently lack basic infrastructure, sanitation and essential services, posing challenges to public health and social stability. Moreover, while urbanisation can drive development within cities, it could exacerbate the rural-urban divide if not paired with strategic policies aimed at improving rural infrastructure, agricultural productivity and access to services.

Balancing rural development, especially addressing challenges like frequent droughts and erratic rainfall patterns within Niger's agricultural sector, with urban growth priorities will be crucial to ensuring inclusive, sustainable progress across all regions of Niger. A comprehensive approach that fosters both urban and rural development is necessary to reduce inequalities and ensure long-term prosperity.

Chart 5: GDP (MER) and growth in the Current Path, 1990-2043



Source: IFs 8.34 initialising from IMF data

Chart 5 presents GDP in market exchange rates (MER) and growth rate in the Current Path, from 1990 to 2043.

The country is heavily dependent on the agriculture sector which is vulnerable to climate-related shocks, such as erratic rainfall patterns and droughts, due to a lack of irrigated agricultural land. Irrigation is however on the rise, and in 2023 production from irrigated land compensated for decreased rain-fed production of key cereals, highlighting the benefits of increased irrigation.

Economic output is hampered by ongoing domestic and regional insecurity, which affects regional integration, access to markets and strains public finances. The level of human capital development is also an obstacle to economic growth, while limited infrastructure and growing insecurity constrains educational access. Political upheaval in 2023 also disrupted the country's economic productivity, when the Economic Community of West African States (ECOWAS) and the West African Economic and Monetary Union (WAEMU) imposed far-reaching sanctions on various sectors of the economy, which contributed to lower-than-projected growth in 2023. The lifting of sanctions that most significantly affected the population—such as border closures, trade restrictions, and the suspension of financial transactions—in February 2024 for humanitarian reasons, along with the partial restoration of financing, subsequently led to higher-than-anticipated growth in 2024.

Niger relies primarily on gold production, which constituted 72.7% of total exports in 2022, while other mineral products contributed an additional 8.6%. The export of oil was expected to increase significantly by the end of 2023, but sanctions imposed by neighbouring states (subsequently lifted) delayed the process, leading to a delay in oil exports through a newly built pipeline running through Benin. The pipeline finally opened in April 2024, and again in August, after a dispute with Benin was settled. The pipeline has a 110 000 barrel per day capacity, which is a fivefold increase on the country's current production capabilities, with production expected to initially start at 90 000 barrels per day. The expected increase in oil revenue has boosted the projected average growth of the economy in 2025 and 2026 above 6%. Non-oil industries and the services sectors will however take longer to recover from the economic shock caused by the 2023 political upheaval.

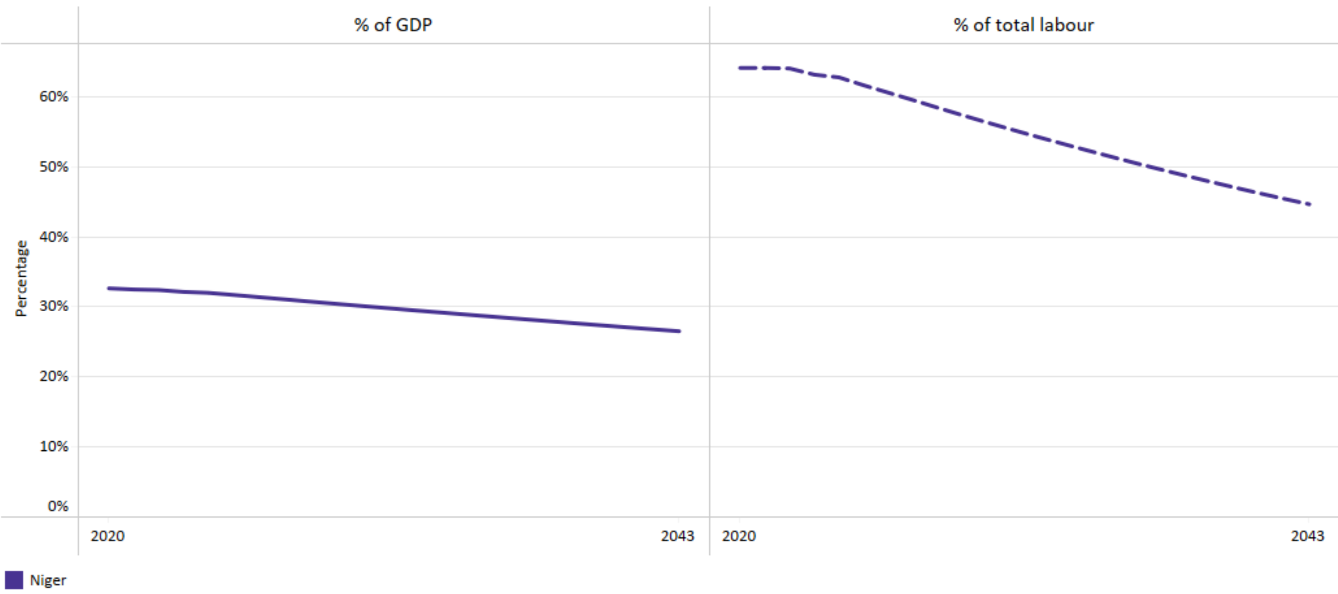
Uranium, once a cornerstone of Niger's exports, has experienced a significant decline in production and export value over the past decade. In 2022, Niger produced approximately **2 020 tonnes of uranium, accounting for around 5% of global**

uranium production. Recent political tensions between Niger and France have further impacted the sector. In June 2024, Niger's military government revoked **the operating license of French nuclear company Orano** for the Imouraren mine, one of the world's largest uranium deposits. Orano, which has been active in Niger since 1971, has faced operational challenges, including **the suspension of production at its Somaïr mine due to financial difficulties and export restrictions.**

The size of Niger's economy stood at US$15.1 billion in 2023 and will grow by 55% to reach US$23.4 billion in 2030. Growth in the short to medium term will be influenced by various factors, such as the decision to withdraw from ECOWAS and the subsequent rise in tariffs and lower trade volumes, continuing vulnerability to climate disasters which will affect agriculture output, and the persistent threat of national and regional insecurity. Furthermore, borrowing costs will likely be higher and domestic resource mobilisation is forecast to remain low. Nevertheless, Niger's GDP will increase to US$51.3 billion by 2043, a robust improvement of 120% over its 2030 level. An average growth rate from 2024 to 2043 is expected at 6.3% which is above the average for low-income African countries, but insufficient to rapidly reduce poverty or grow incomes.

As oil exports start to flow, assuming relations with Benin are strengthened and maintained, care will have to be taken to reinvest the economic gains in the country's human, social and knowledge capital to diversify the economy, to insulate Niger against the price volatility of international oil and commodity markets. Following the start of large-scale oil production and exports, the World Bank estimates that government oil revenues are expected to rise to 5% of GDP by 2030, from less than 1% of GDP in 2024. Part of this windfall can then be used to invest in social sectors in general and education in particular.

Chart 6: Size of the informal economy in the Current Path, 2020-2043



Source: IFs 8.34 initialising from Elgin and Oztunali (2008), and Schneider and Enste (2012) data

Chart 6 presents the size of the informal economy as per cent of GDP and per cent of total labour (non-agriculture), from 2020 to 2043. The data in our modelling are largely estimates and therefore may differ from other sources.

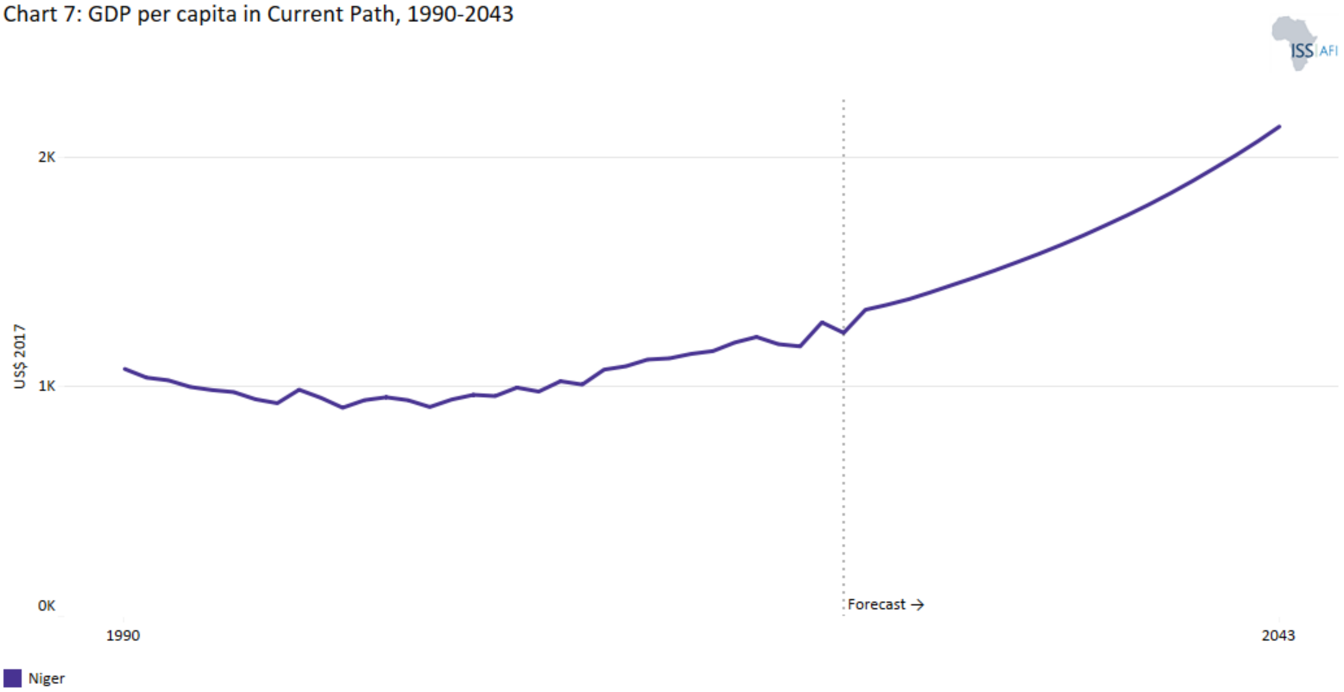
The informal economy comprises the part of any economy that is neither officially taxed nor monitored. Countries with high informality normally have a number of development challenges, such as low revenue mobilisation, and economic growth tends to be below potential. Informal economic activities are also less productive than those in the formal sector, providing workers with little to no social protection and formal contracts. The informal sector is typically also characterised by high levels of gender and income inequality.

Until ECOWAS lifted its sanctions at the start of 2024, the informal economy mitigated some of the negative side effects of trade restrictions on the food security situation in Niger. Informal traders were still able to access the markets of states imposing ECOWAS sanctions, which kept food available, albeit at higher prices. Whilst formalisation of the informal sector remains a priority, the sector provides a crucial lifeline for many people unable to enter the formal sector, a situation that will continue for many years in the future.

Efforts to formalise the sector must therefore be taken with care to protect informal food supply lines and ease the transition from informal to formal. In fact, Niger would be well advised to grow the informal sector in the absence of low formal sector growth since the majority of Niger's workforce is employed in the informal sector, equating to 63.2% in 2023. The economic size of the sector reached 32.1% of GDP in the same year.

In absolute terms, the sector will continue to grow over the forecast horizon, but as a share of total GDP its contribution will fall to 30.2% by 2030 and 26.5% by 2043. Similarly, informal labour force employment will reduce to 56.3% by 2030 and 44.7% by 2043 on the Current Path.

Chart 7: GDP per capita in Current Path, 1990-2043



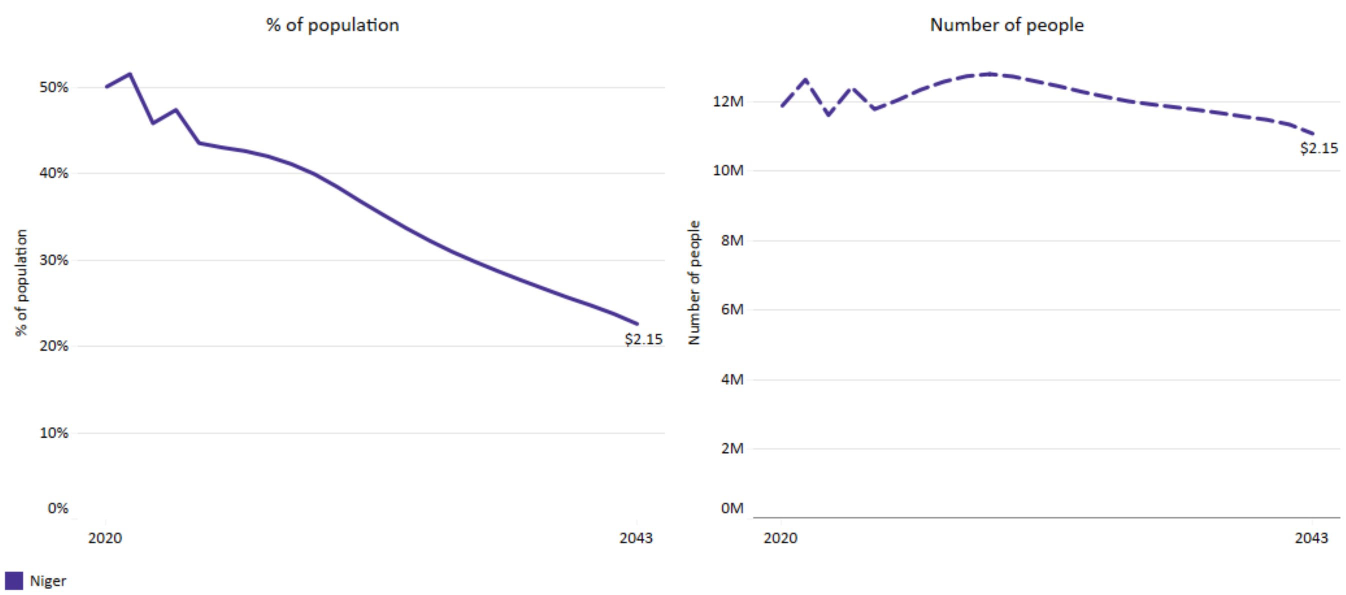
Source: IFs 8.34 initialising from IMF data

Chart 7 presents GDP per capita in the Current Path, from 1990 to 2043, compared with the average for the Africa income group.

Modest economic growth coupled with high fertility rates have led to Niger's GDP per capita being the fifth lowest globally at US$1 240 in 2023. At independence in 1960, the average income per person equated to US$1 740, but years of rapid population growth and slow economic growth meant GDP per capita fell to US$1 080 by 1990. Decades of political instability and multiple coups resulted in economic stagnation, with GDP per capita reaching a low point of US$910 in 2004, before slowly rising to its current level. Compared to the average of its low-income group peers in Africa, Niger fell below the group's average in 1984, with the gap growing from US$190 in 1990 to US$570 by 2023.

In the Current Path, Niger's GDP per capita will increase to US$1 509 by 2030 and US$2 133 by 2043, therefore only surpassing its 1960 level of US$1 740 in 2036. The country will continue to lag behind the average for its income group, with the gap remaining at US$570 by 2030 before growing to US$852 by 2043.

Chart 8: Extreme poverty in Current Path, 2020-2043



Source: IFs 8.34 initialising from UNPD population prospects estimate, WDI and PovcalNet data

Chart 8 presents the rate and numbers of extremely poor people in the Current Path from 2020 to 2043.

In 2022, the World Bank updated the poverty lines to 2017 constant dollar values as follows:

- The previous US$1.90 extreme poverty line is now set at US$2.15, also for use with low-income countries.
- US$3.20 for lower-middle-income countries, now US$3.65 in 2017 values.
- US$5.50 for upper-middle-income countries, now US$6.85 in 2017 values.
- US$22.70 for high-income countries. The Bank has not yet announced the new poverty line in 2017 US$ prices for high-income countries.

Monetary poverty only tells part of the story, however. In addition, the global Multidimensional Poverty Index (MPI) measures acute multidimensional poverty by measuring each person's overlapping deprivations across 10 indicators in three equally weighted dimensions: health, education and standard of living. The MPI complements the international US$2.15 a day poverty rate by identifying who is multidimensionally poor and also shows the composition of multidimensional poverty. The headcount or incidence of multidimensional poverty is often several percentage points higher than that of monetary poverty. This implies that individuals living above the monetary poverty line may still suffer deprivations in health, education and/or standard of living.

Government efforts to actively combat poverty in Niger started in earnest in 1997 when the Framework Program to Combat Poverty (PCLCP) was adopted. This framework was followed by the Poverty Reduction Strategy (PRS) in 2002, which served as the principal set of guidelines for all economic and social policies. The Strategy focussed on increasing access to basic social services, developing rural areas, fighting food insecurity and desertification and increasing incomes.

The PRS was followed by the Accelerated Development and Poverty Reduction Strategy (ADPRS), which set out the country's poverty alleviation objectives from 2008 to 2012. The ADPRS rested on seven pillars, with the three most pertinent to poverty reduction being equitable access to quality social services, control of population growth, reduction of inequalities, and strengthening of social security.

The next development plan, titled the 'Economic and Social Development Plan' (PDES) for the period 2012-2015 focused on sustainable development, inclusive growth and good governance. Building on the foundation of the previous strategies, the PDES focused on greater sustainability, especially in agricultural development and diversifying the economy.

A subsequent PDES was adopted in 2017 and served as the first implementation plan for a newly developed National Growth strategy, termed the Niger 2035 Sustainable Development and Inclusive Growth Strategy (SDIGS). The 2017-2021 PDES focussed on five axes, namely, cultural renaissance, improved governance, social development and a demographic transition, greater economic growth and sustainable management of the environment. A new PDES was adopted in 2022 and runs until 2026, building on the priorities set out for the 2017-2021 period.

These efforts have resulted in steadily decreasing poverty rates since the mid-2000s. In 1981, 66.3% of the population lived below the US$2.15 poverty line, a rate which rose to 79.5% by 2007, due in large part to the political turbulence in the 1990s and early 2000s. However, poverty levels have steadily declined since, dropping to 47.4% by 2023. The vast majority of the extremely poor live in rural areas, while urban areas have relatively low levels, especially in the capital city of Niamey. Covid-19 reversed some of the gains made in reducing poverty, particularly in rural areas, and constrained access to health and education, which was already low.

The natural hazards facing the agriculture sector will continue to be a large risk factor for poverty reduction efforts in Niger, as the sector employs most of the country's poor population. The poverty rate will however continue to steadily decline over the forecast horizon, reaching 38.5% in 2030 and 22.6% by 2043.

Chart 9: National Development Plan of Niger

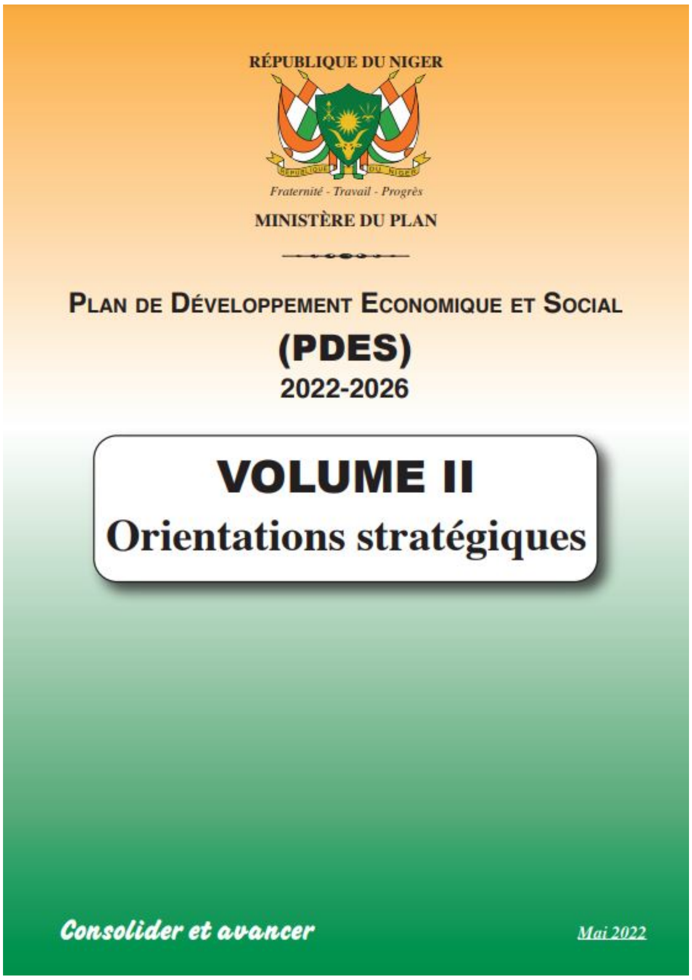


Chart 9 depicts the National Development Plan.

The overarching development strategy was adopted in 2017 and is titled the Niger 2035 Sustainable Development and Inclusive Growth Strategy (SDIGS). Two medium-term development plans have been formulated to implement the strategy, titled PDES 2017-2021 and PDES 2022-2026. The SDIGS rests on six strategic axes:

1. Security of the territory
2. Development of a dynamic private sector
3. Demographic transition
4. Revitalization and Modernization of Rural Areas
5. Human capital development
6. Modernization of government institutions

To achieve these goals, the PDES 2022-2026 stipulates three axes of its own:

1. Human capital development, inclusion and solidarity
2. Strengthening Governance, Peace and Security

3. Transforming the structure of the economy

The PDES 2022-2026 aims to boost progress towards these three priorities by ensuring its population is well-fed, has access to clean water and sanitation services, and does not experience gender-based discrimination. The plan also focuses on greater internal security, better border management and better local governance. Lastly, to promote the structural transformation of the economy, the Plan commits to revitalising the private sector, the sustainable management of the environment and productive use of oil and mineral resources.

The PDES 2022-2026 plan importantly identifies a series of factors that will ensure it is implemented successfully:

1. Establishing and operationalising the needed institutional bodies
2. Allocating sufficient resources in a consistent manner
3. Appropriate tools for mobilising external financial resources
4. Building capacity for all stakeholders
5. Developing and implementing an effective communication strategy
6. Reliable and disaggregated data

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