ISS AFRICAN FUTURES

Niger

Niger: Scenarios

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Niger: Scenarios

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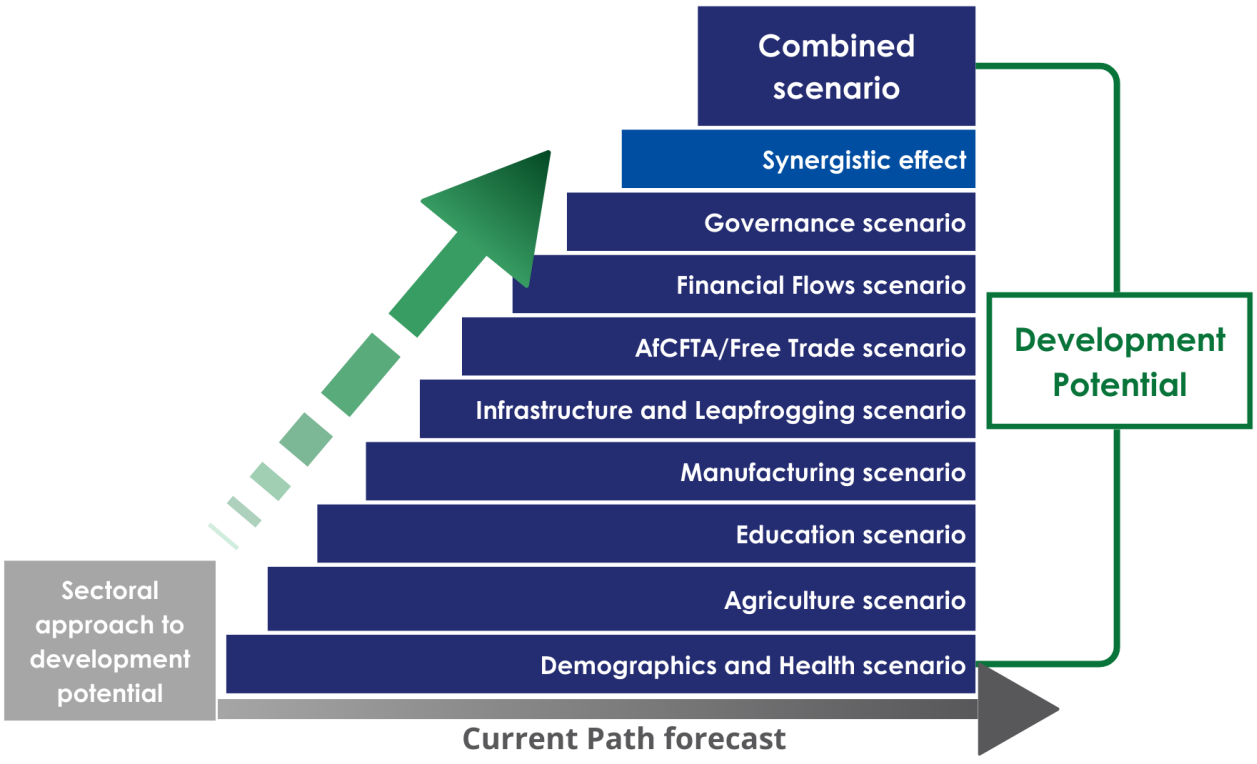
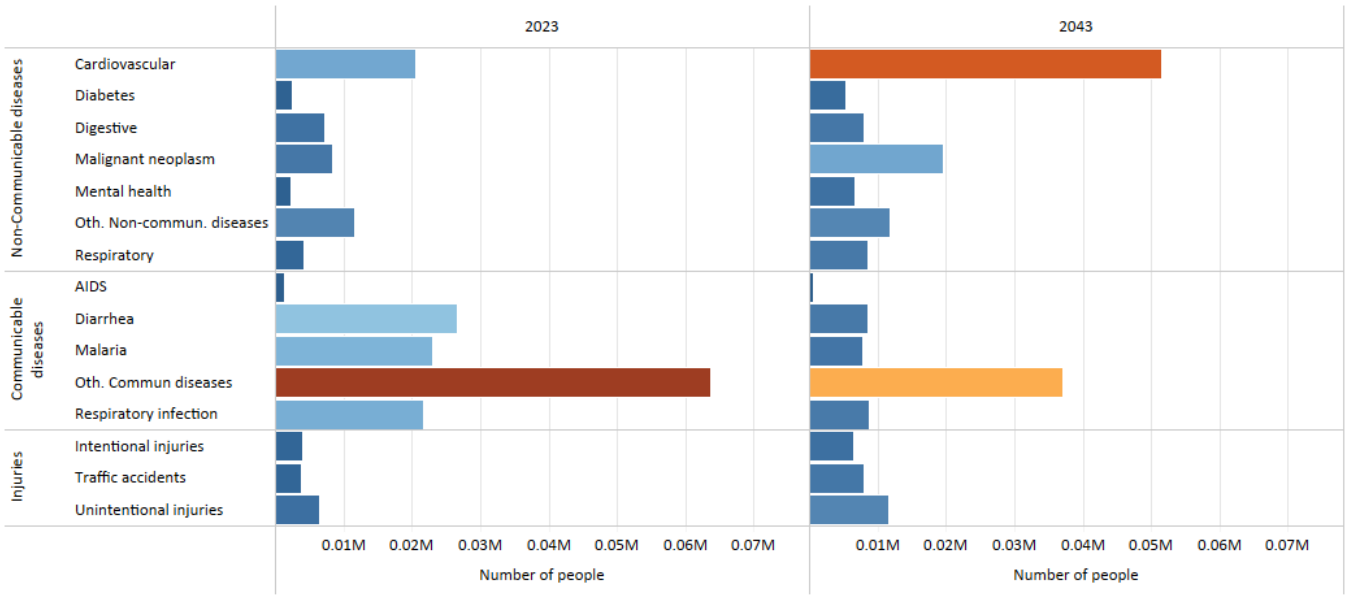


The About Page explains the eight sectoral scenarios and their relationship to the Current Path and the Combined scenario. Chart 10 summarises the approach.

Demographics and Health scenario

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



Source: IFs 8.34 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.

Niger faces several challenges related to the provision of quality of healthcare to its citizens:

1. High rates of maternal, neonatal and child morbidity and mortality
2. Frequency of epidemics and other emergency situations
3. Poor performance of the health system linked to poor health coverage and insufficient human, material and financial resources
4. Inequalities and inequities in access to essential health services for the poor, women and youth
5. Weakness of partnership, coordination and intersectoral collaboration (links between health and poverty, health and food security, and health and the environment)

As a result, the country battles with a high prevalence of deaths from other communicable diseases, diarrhoea, malaria, malnourishment amongst those aged under 5 years and maternal mortality. Niger also has one of the highest population growth rates in the world, which will continue to place strain on the already limited services available.

Niger has historically battled with communicable diseases such as malaria, respiratory infection and diarrhoea, with non-communicable diseases playing a smaller part in the country's mortality distribution. In 2023, 31% of deaths stemmed from other communicable diseases, followed by diarrhoea, malaria and respiratory infections at 13, 11 and 10% respectively. Deaths due to cardiovascular complications, which is a non-communicable disease, ranked fifth with 10%, followed by other non-communicable diseases at 6%.

The distribution will change over the forecast horizon, as cardiovascular diseases will account for 15% of all deaths by 2030, ranking 2nd, and 26% of all deaths by 2043, ranking 1st. Malignant neoplasms, which relate to deaths caused by cancers, will also grow in prominence to rank 3rd by 2043 with 10% of all deaths, while malaria's share will drop to 8% by 2030 and 4% by 2043. In sum, Niger will experience its epidemiological transition (when deaths from non-communicable diseases exceed those from communicable diseases) in 2035, and thereafter evidence a double burden of disease with more costly care for non-communicable diseases placing an additional strain on its health budget.

Niger has abundant groundwater and surface water resources, yet, a lack of access to piped water and sanitation services adds to the spread of disease and disproportionately affects children. The country also does better than most other low-income countries in Africa on both counts.

Using piped water reduces the risk of waterborne diseases spreading among civilians, and improves productivity as people spend less time collecting water. Also, households need to spend less money on healthcare services due to illnesses contracted from unsafe water, increasing disposable income and living standards. In 2023, 41.4% of Niger's population had access to piped water, while 17.5% used improved sanitation services. Progress in water access will be slow over the forecast period, with piped water access reaching 42.9% by 2030 and 49.2% by 2043. The use of improved sanitation services will rise rapidly from a low base, reaching 27.8% by 2030 and 42.5% by 2043.

Niger has a mixed record in a number of health indicators compared to its income group peers: in maternal mortality, the country's rate stood at 402.1 deaths per 100 000 live births in 2023, 19.5 deaths higher than the income group's average. The gap will decrease to 2.9 by 2030, and in 2043 Niger's maternal mortality rate will be below the average for low-income Africa, at 157.7 deaths per 100 000 live births compared to 180.8 for the income group.

Stunting among children below 5 years of age has however been a persistent problem in the country: from a high of 54.8% in 2006, Niger has modestly reduced the rate to 46.7% by 2023, in contrast to low-income Africa's rate of 34.7%. The gap will narrow over the forecast horizon, reaching 7.3 percentage points by 2030 and 3.5 percentage points by 2043. Niger will however only reach the SDG target of 25% by 2043, 13 years after 2030.

Life expectancy has been another positive indicator where Niger has succeeded in closing the gap with its income group peers: in 1990, life expectancy for low-income Africa stood at 51.9 years, whereas Niger's was 47.5 years. By 2023, the gap had narrowed to 1.5 years, as the country's life expectancy rose considerably to 64.8 years. Over the forecast horizon, Niger will outperform low-income Africa, so that by 2030 its life expectancy will be 0.7 years higher (at 69.2 years), with the gap growing to 2.2 years by 2043 as Niger's life expectancy reaches 74 years.

International aid and multilateral organisation such as USAID and the WHO have been key partners in Niger's healthcare system. The WHO in particular has taken a lead role in coordinating and planning the work done by various international actors in the health sector, and led the development of the Country Cooperation Strategy (CPS), a guiding document which supports the implementation of Niger's own Health and Social Development Plan (PDSS) and serves to harmonize work between other UN agencies, development partners and health actors. The CPS has identified four key areas for improvement between 2023 and 2027 that will significantly boost health outcomes in the country:

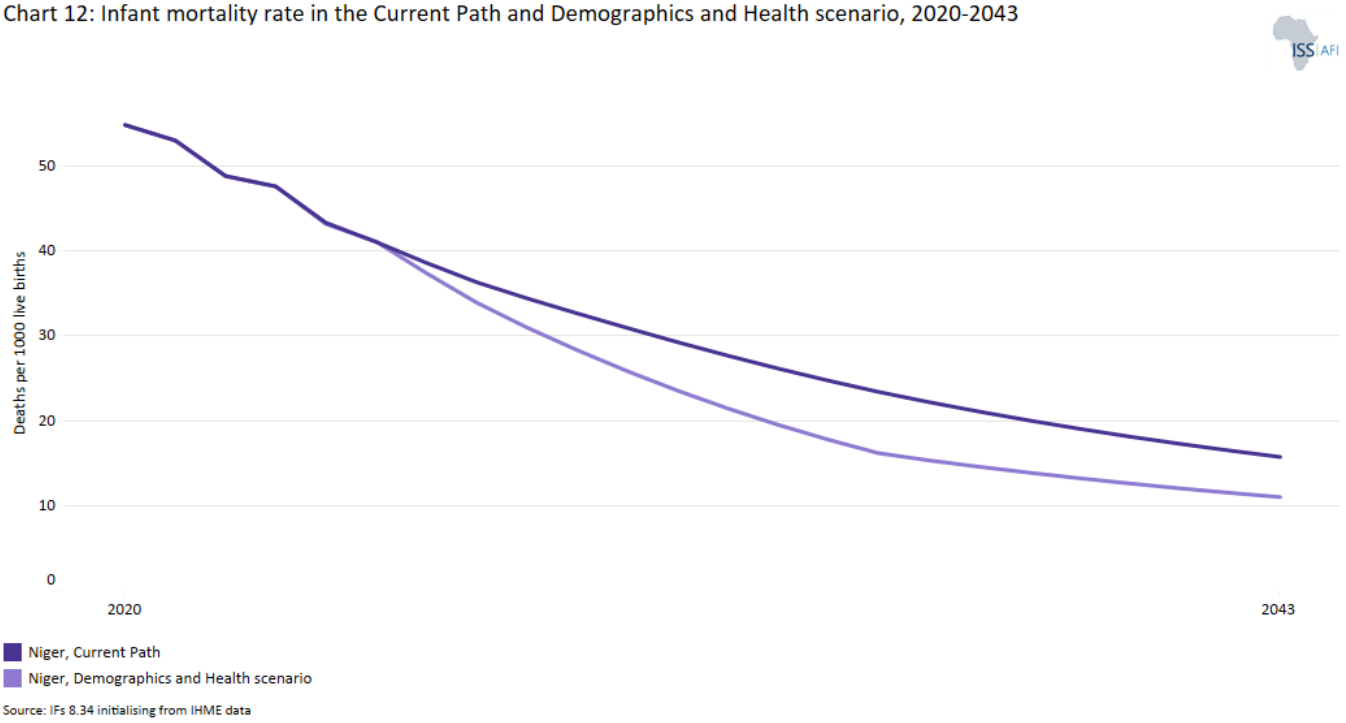
1. promote universal health coverage through a stronger healthcare system

2. strengthen the ability of the health system to respond to health emergencies
3. increase awareness and consideration of environmental and social determinants of health
4. improve the institutional capacity of the WHO

Recent actions by the Trump administration have raised concerns over U.S. aid to Niger. In January 2025, President Trump signed Executive Order 14169, suspending all foreign development assistance, including USAID, for a 90-day review. In February, Elon Musk, leading the Department of Government Efficiency, announced the shutdown of USAID, halting key health programs globally, including in Niger. The suspension threatens essential health services such as maternal care, disease prevention, and medical supply chains. The WHO and other partners must now seek alternative funding to mitigate the impact. The success of Niger's Country Cooperation Strategy (CPS) and broader health goals will depend on the international community's response.

Ensuring foreign aid continues to flow into the country, and leveraging as wide a range of external financing options for the health system, remains a priority for the Nigerien authorities, and will be a key determinant of success moving forward.

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



Source: IFs 8.34 initialising from IHME data

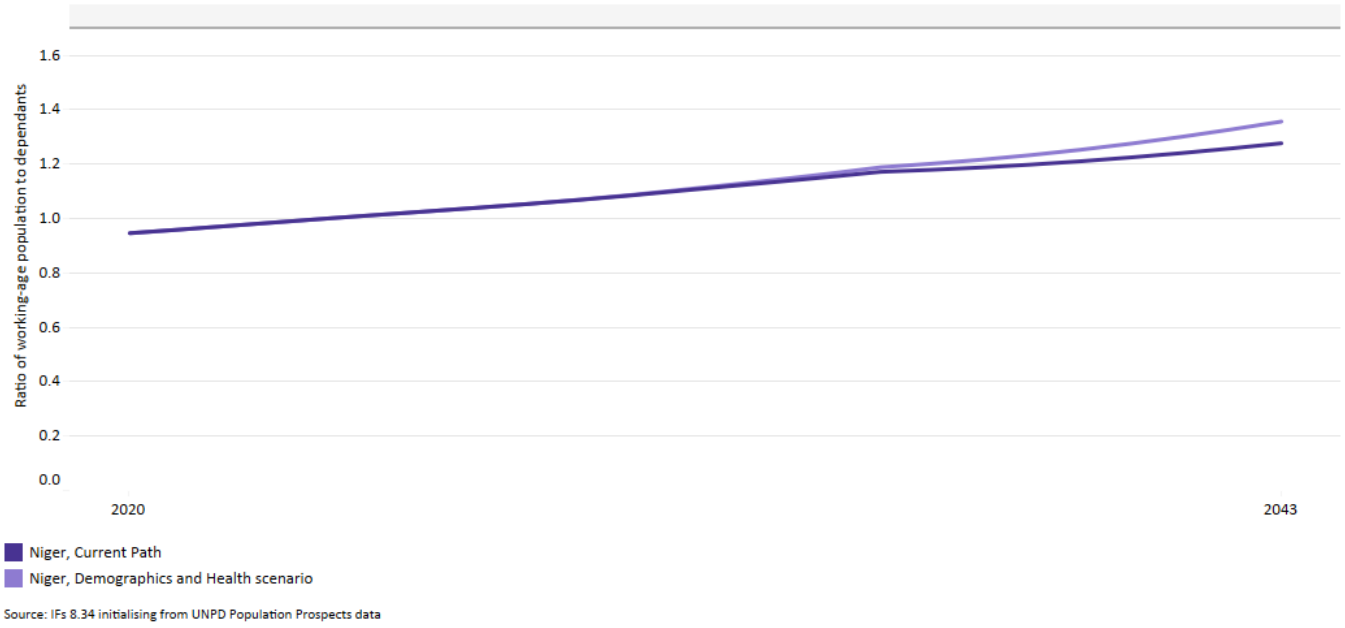
Chart 12 presents the infant mortality rate in the Current Path and in the Demographics and Health scenario, from 2020 to 2043.

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.

Niger has significantly reduced the burden of infant mortality since 1990, when infant deaths per 1 000 live births stood at 126.4, compared to 109.1 for low-income Africa. By 2023, the country's rate had dropped to 47.6, only 4.2 deaths higher than the income group average. In the Current Path, Niger's infant mortality rate will drop to 30.9 deaths per 1 000 live

births by 2030, and 15.7 deaths by 2043. The interventions in the Demographics and Health scenario will see Niger's infant mortality rate drop to 25.8 deaths per 1 000 live births by 2030 and 11 deaths per 1 000 live births by 2043. The country will therefore only reach the SDG target of 12 deaths per 1 000 live births by 2041.

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



Source: IFs 8.34 initialising from UNPD Population Prospects data

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

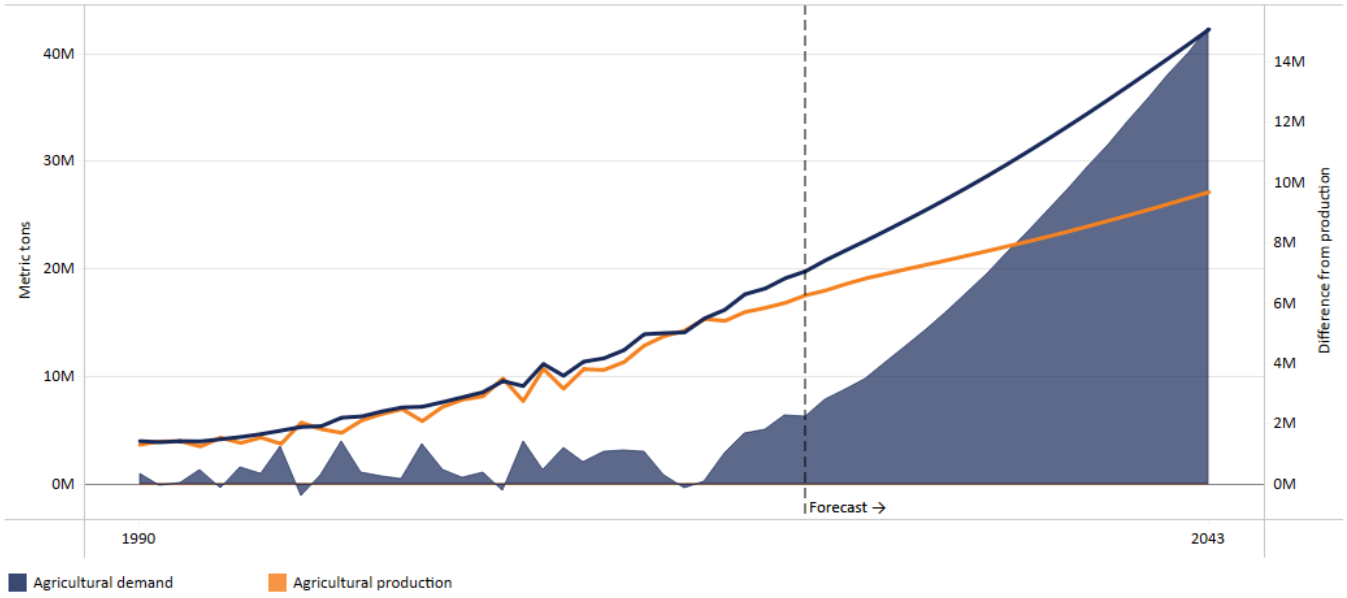
The dividend is the window of economic growth opportunity that opens when the ratio of working-age persons to dependents increases to 1.7 to 1 and higher.

Niger's high population growth rate means it will take a considerable time to reach this ratio and the country trails behind the average for low-income Africa. In 2023, the ratio of working-age persons to dependents stood at 0.99 to one. As the country's young population gradually ages and better health outcomes lead to lower birth rates, this ratio will steadily improve, reaching 1.1 by 2030 and 1.3 to one by 2043 in the Current Path. Niger will reach the 1.7 to one ratio by 2058, compared to 2052 for low-income Africa.

Population changes take a long time to have an effect and in the Demographics and Health scenario, Niger's ratio only improves slightly but with the potential for long-term positive effects as the contribution of labour to economic growth steadily increases. By 2030, the country's ratio of working-age persons to dependents will reach 1.1 to one, and by 2043 the ratio will increase to 1.4 to one. Despite the scenario's interventions that reduce infant mortality, increase contraceptive use and lower overall mortality rates, Niger's rapid population growth will continue to keep the ratio low and constrain improvements in income. Lower fertility rates will eventually make an important contribution to higher incomes and lower poverty.

Agriculture scenario

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



Source: IFs 8.34 initialising from FAO food balance sheets data

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 and equipped land. 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.

The agriculture sector has historically been the most important sector of the Nigerien economy, employing the majority of the country's labour force, 71% of total employment in 2022, and constituting more than a third of GDP by 2023. Subsistence farming is key to the sector, with households farming on plots usually not bigger than 2 hectares. The main crops grown on irrigated land are onions, rice, cabbage, tomatoes and potatoes, while rainfed farming focuses on food crops such as millet and sorghum, with the main cash crops being cowpeas and groundnuts. Unfavourable climatic conditions have been a major constraint for the sector, with floods, extended droughts and unpredictable rainfall patterns leading to protracted periods of food and animal feed shortages, increasing chronic food insecurity and the spread of infectious disease.

Livestock farming is also an important part of the agriculture sector, and it employs more than 85% of the rural population. Pastoral practices focus on cattle, sheep and goats to generate meat, milk, and hides for food and export, with nearly 75% of livestock raised in a nomadic and transhumant mode. Pastoralists face numerous challenges, the most pressing related to insecurity and the adverse effects of climate change. As the climate crisis worsens livestock farmers face decreased access to water resources, a lack of livestock feed, and an increasing number of droughts, bushfires and floods, while greater insecurity means decreased access to water points and grazing lands, and loss of livestock.

These challenges have led to an unproductive agriculture sector, characterised by overexploited soil, limited fertiliser

usage and rudimentary agriculture equipment. In 2023, Niger had the third-lowest yields per hectare in Africa, at 0.94, only above Gambia and Lesotho. The productivity of the sector will rise slowly to 1.1 by 2030 and 1.3 tons per hectare by 2043. In comparison, the average for low-income Africa stood at 2.8 in 2023 and will rise to 3.1 by 2030 and 3.5 by 2043.

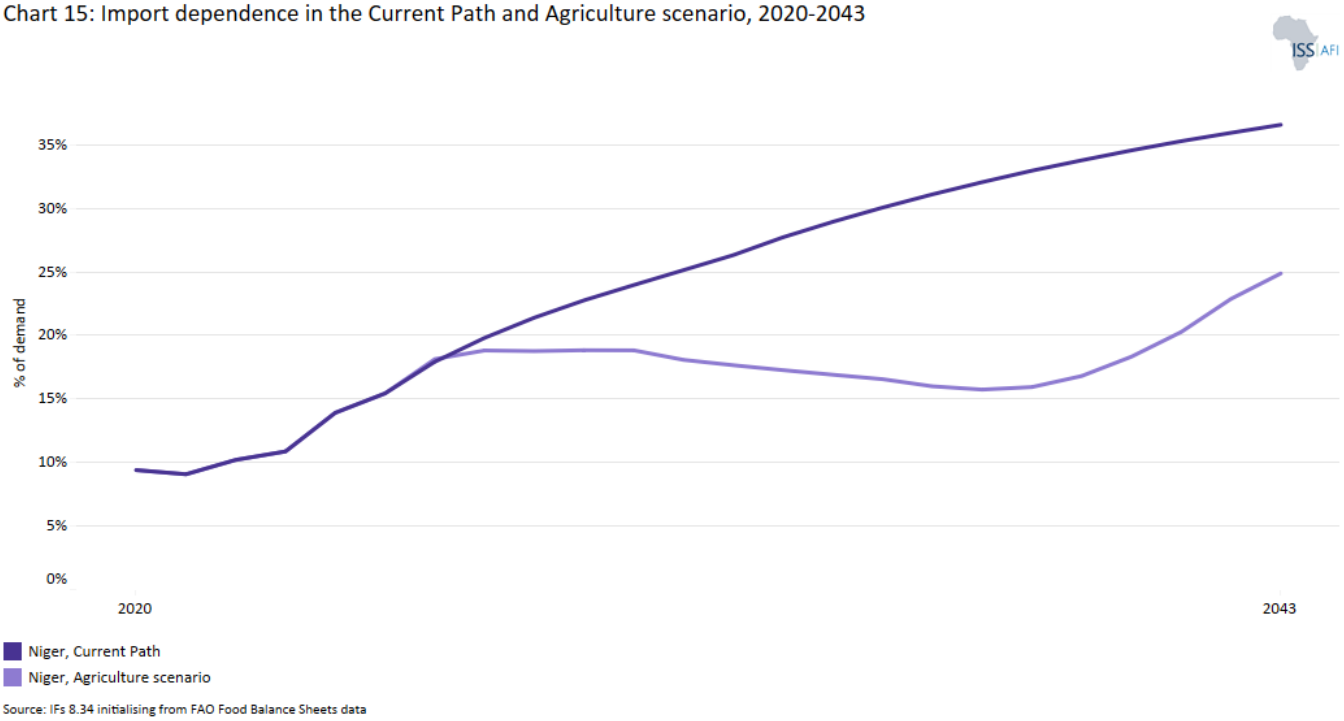
Consequently, Niger faces a situation of heightened food insecurity and malnourishment. As of August 2024, 13% of the population, or 3.4 million people, lived in a crisis or emergency food insecurity state, with 13.5% of the total population and 32.2% of children also being malnourished in 2023. The share of the total population which are malnourished will drop to 10.4% by 2030 and 7.4% by 2043. The percentage of children who are malnourished will remain high over the forecast horizon, reaching 25% by 2030 and 15.6% by 2043.

The country already produces too little to meet agricultural demand, and the gap will grow significantly over the forecast horizon. In 2023, agricultural demand stood at 19.8 million metric tons, 2.2 million metric tons more than total agricultural production. The gap will grow to 5.7 million metric tons by 2030 and 15.1 million metric tons by 2043.

To counteract this trend of increasing food insecurity, the sector must focus on the following priorities:

1. Climate-smart management of natural resources
2. Increasing access to finance for farmers
3. Better access to nutritious foods
4. Training of farmers in soil fertility management and crop protection
5. Increasing women's access to land, agricultural technologies and financial services
6. Ensuring farmers and pastoralists are safe while conducting agricultural activities.

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



Source: IFs 8.34 initialising from FAO Food Balance Sheets data

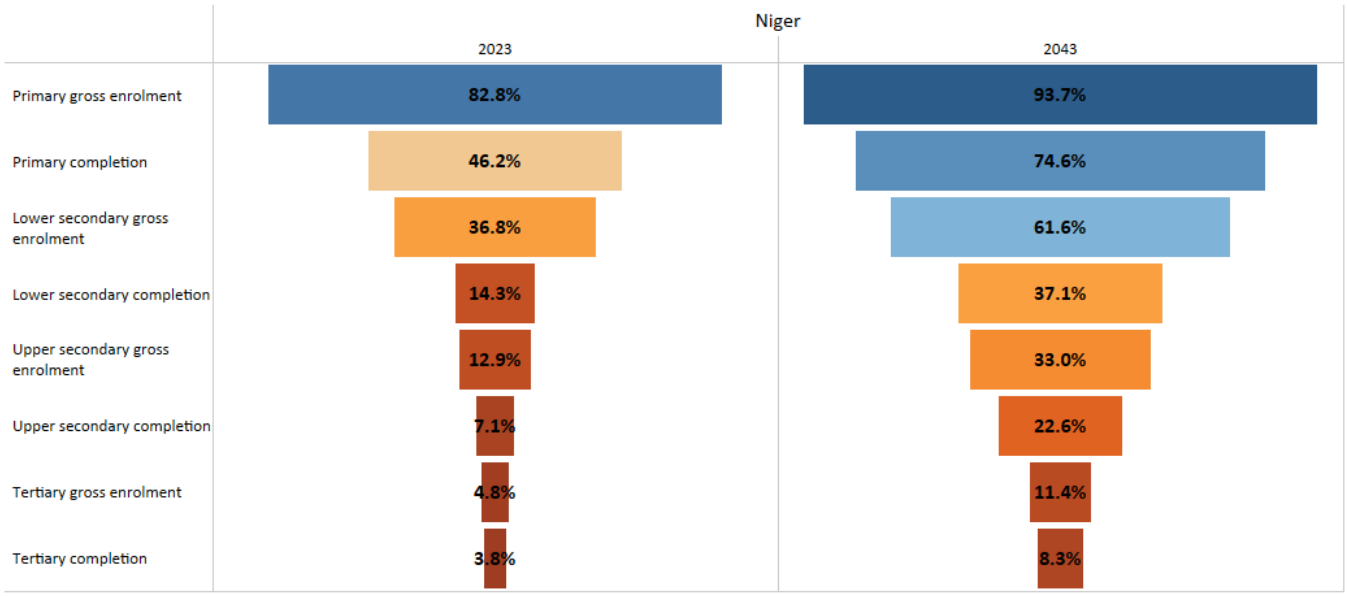
Chart 15 presents the import dependence in the Current Path and the Agriculture scenario, from 2020 to 2043.

Niger has been an net importer of food since 1972, and agricultural imports as a percentage of demand steadily increased from 1% to 10.9% by 2023, compared to low-income Africa's average of 9.1%. In the Current Path, Niger's import dependence will rise to 24% by 2030 and 36.6% by 2043, while low-income Africa's will rise to 20.8% by 2030 and 31.6% by 2043.

The Agriculture scenario will increase total agricultural production to 23.2 million metric tons by 2030, 2.4 million tons more than in the Current Path. By 2043, total agricultural production will rise to 31.4 million tons, 4.3 million tons more than in the Current Path. The result is a lower level of import dependence: by 2030, agricultural imports as a percentage of demand will be 18.8% compared to 24% in the Current Path, and by 2043, the level of import dependence will have risen to 24.9% compared to 36.6% in the Current Path.

Education scenario

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



Source: IFs 8.34 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.

The education system in Niger struggles to enrol the large and growing number of children of school engaging age, with more than 50% aged between 7 and 16 years out of school. In addition, those in school face a lack of quality infrastructure, with 36% of pupils receiving schooling in a classroom classified as 'Straw Hut Classroom'. The growing levels of insecurity has also hindered access for students, as schools have been forced to close. The Nigerien government has however embarked on a Sector Education Plan aiming to replace 36 000 of these classrooms with higher quality classrooms. The plan also aims to train and hire qualified teachers, while integrating contract teachers into the civil service.

Even with these challenges, Niger's gross primary enrolment has increased from 26.2% in 1990 to 82.8% by 2023, but remains far behind the average for low-income Africa, which gross primary enrolment reached 108.3% by 2023. The country will continue to make progress but a slower rate, reaching 88% by 2030 and 93.7% by 2043.

Gross enrolment remains low across the lower-secondary, upper-secondary and tertiary levels: lower-secondary gross enrolment stood at 36.8% by 2023, upper-secondary enrolment was 12.9% and tertiary enrolment was 4.8%. The country will progress at all levels, as lower-secondary enrolment improves to 50.4% by 2030 and 61.6% by 2043, while upper-secondary enrolment grows to 20.9% by 2030 and 33% by 2043. Tertiary enrolment rates will remain low, reaching 7.2% by 2030 and 11.4% by 2043.

The system is gradually succeeding in getting children in school but the quality of education pupils are receiving remains insufficient for the labour market. In 2020, Nigerien pupils were learning at half the expected rate when taking into account the number of years of schooling they complete. In addition, literacy rates for second graders only reached 44.5% in 2019, while 90% of 10-year-olds surveyed could not read or write. High levels of teacher absenteeism, low levels of access to textbooks and learning materials and low quality teaching serve as the main causes of the poor learning outcomes.

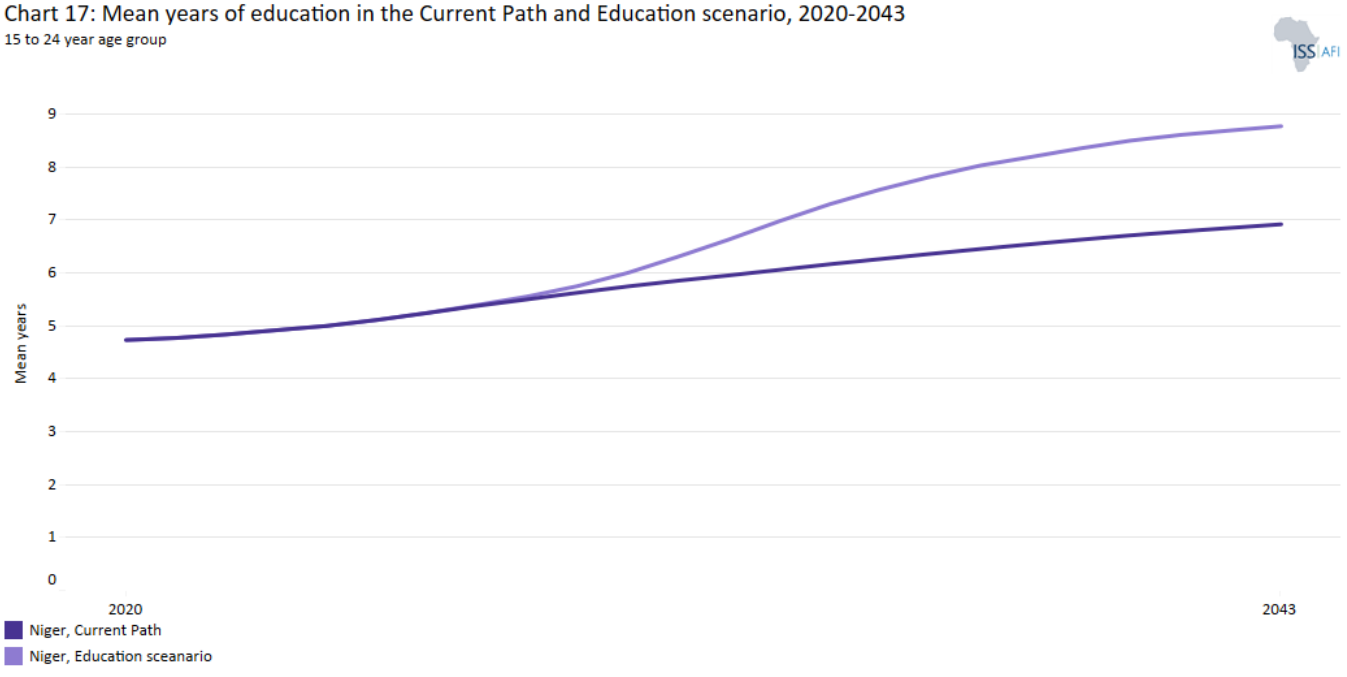
Completion levels follow the same trend as gross enrolment rates, primary completion rates is much higher than rates at the other three levels. In 2023, while the primary completion rate stood at 46.2%, the lower-secondary completion rate was 14.3%, the upper-secondary rate was 7.1% and completion rates at tertiary level was 3.8%. Pupils are thus struggling to remain in school and transition to the next level of their education.

Gender disparities in education are an important issue which remains a priority for the government to address. The ratio of female to male pupils is below 1 at all four levels of education. The ratio of female to male pupils for primary gross enrolment was 0.87 in 2023, which falls to 0.8 at the lower-secondary level, 0.64 at the upper-secondary level and 0.46 at the tertiary level. Very high rates of child marriage severly hamper access for girls, with the prevalence rate for girls aged between 15 and 19 years standing at 66% in 2022, the highest rate in the world. Early marriage goes hand in hand with early pregnancy, which further reduces access to education. Rising insecurity and long distances to travel to school further lower the rate at which girls attend school. The Nigerien government adopted the National Gender Policy to address these issues, aiming to eliminate discrimination by 2027.

The most important improvement the Nigerien authorities must enact is how efficiently funds are spent in the education sector, as it already receives 20% of the state budget and significant amounts of donor funds. Greater efficiency is especially pertinent at a time when government revenues from oil exportation is expected to rise in the short term, potentially increasing the amount of the state budget the authorities can spend on social sectors such as education. A renewed focus on closing the gender gap in enrolment and completion of school must be prioritised, too, as less gender discrimination will lead to greater labour force participation, higher female wage earnings and better fiscal sustainability.

Chart 17: Mean years of education in the Current Path and Education scenario, 2020-2043

15 to 24 year age group



Source: IFs 8.34 initialising from Barro-Lee data

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 society's stock of knowledge is changing. Niger's mean years of education has increased rapidly since 1990, rising from 1.6 to 4.9 by 2023. The gender gap is significant, with mean years of education for male students reaching 5.5 years in 2023, while female students received an average of 4.3 years of schooling. In the Current Path, this gap will only close marginally over the forecast horizon: by 2030, mean years of education for male students will have risen to 6.3 years, compared to 5.2 for female students. The gap will still stand at 0.7 years by 2043, as male students receive an average of 7.3 years of schooling and female students receive 6.6 years. As shown in Chart 16, an increased emphasis must be placed on providing equal opportunities for male and female pupils to receive education to ensure women have the same skills and expertise to meaningfully participate in Niger's economy.

The Education scenario will increase the mean years of education for adults aged between 15 and 24 years to 6 by 2030 and 8.8 by 2043, compared to 5.7 by 2030 and 6.9 by 2043 in the Current Path.

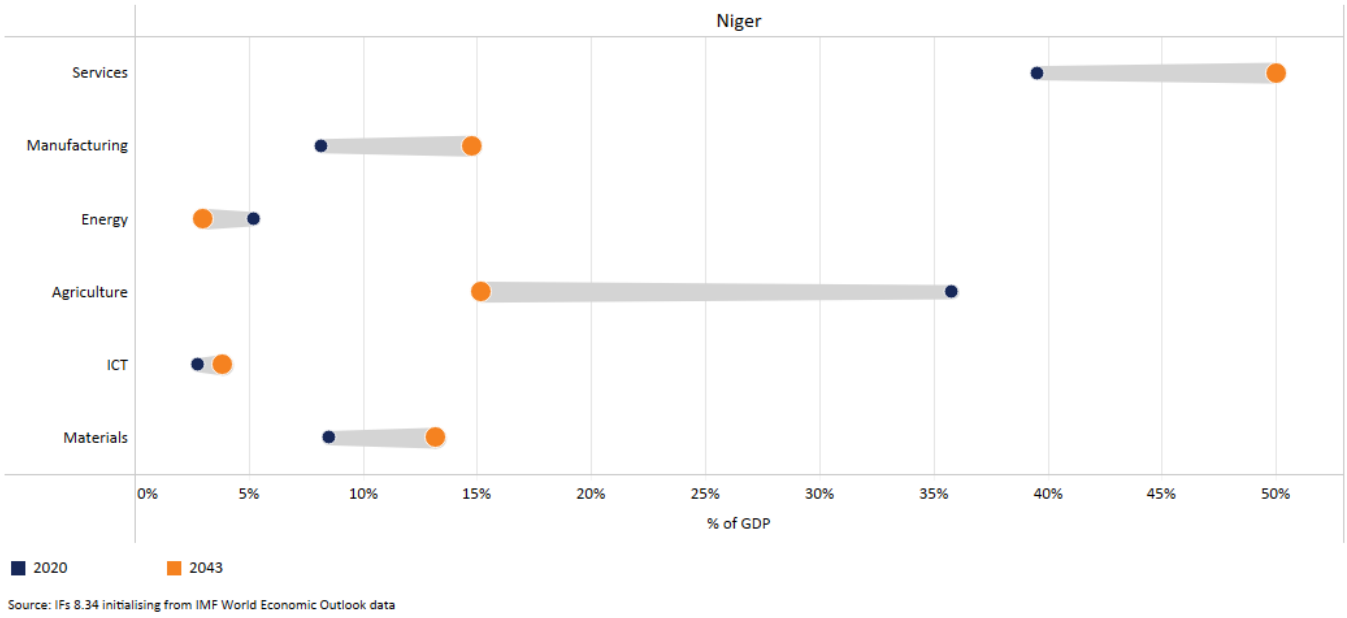
Not only will the Education scenario increase the number of years pupils spend in school, but it will also improve the quality of education they receive while in the education system. Although it remains difficult to measure the quality of education, our modelling uses the educational quality data from the World Bank at primary and secondary school level as an input to gauge the effectiveness of the schooling system. Niger lags behind its income group peers at both levels of schooling: in 2023, the average primary test score in the country reached 18.4 out of a possible 100 compared to 23.6 for low-income Africa. Similarly, the average secondary test score was 27.4 for Niger in 2023, considerably lower than the score of 32.8 for low-income Africa.

In fact, Niger had the sixth-lowest scores for primary school education quality in Africa by 2023, and the second lowest for secondary school. In the Current Path, the country makes slow progress, and will not improve its ranking at either level over the forecast horizon. The slow growth in quality will result in primary level scores reaching 19.9 by 2030 and 22.2 by 2043, while secondary level scores will rise to 28.8 by 2030 and 30.9 by 2043. The Education scenario addresses these low scores, raising primary level test scores to 20.2 by 2030 and 24.2 by 2043, while secondary level test scores will rise to 29.2 by 2030 and 33 by 2043.

Niger's below-average performance in the twin indicators of mean years of education and average test score at the primary and secondary levels means the average Nigerien will not complete primary school and will receive education of a low standard while still in school. Subsequently, workers will be ill-equipped to work in industries requiring skilled labour. Currently, as Niger still relies heavily on the agriculture sector for employment, much of which is in the informal sector, the negative consequences will be mitigated, but as the economic complexity of the country increases, demand for high-skilled workers will rise.

Manufacturing scenario

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



Source: IFs 8.34 initialising from IMF World Economic Outlook data

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 participation rates, particularly among females where appropriate.

Visit the theme on Manufacturing for our conceptualisation and details on the scenario structure and interventions.

The Nigerien economy is dominated by agriculture and low-end services, with manufacturing playing a small part in the country's total GDP. In 2023, services contributed 40.2% to the total GDP, followed by agriculture at 34.9% and materials, which includes mining activities, at 8.5%. The country relies heavily on the fragile livestock farming sector, which makes up nearly half of the agricultural sector's contribution to GDP, while also relying heavily on the exportation of gold for foreign currency earnings. Recent improvements and expansion of oil-producing and oil-exporting capabilities promise to contribute significantly to GDP growth. The country also has large deposits of uranium, which signifies the largest mining process in Niger but contributes little to export earnings due to historically imbalance agreements with France, the primary buyer. Diversifying the economy and growing the manufacturing sector is hindered by low levels of infrastructure development, a small financial sector which hinders access to credit and household savings, and factor productivity remains low.

The latest medium-term development, PDES 2022-2026, identified a number of challenges in the manufacturing sector:

1. The high cost of production inputs (land, energy, transport)
2. The absence of a clear industrial policy
3. A lack of sufficient equity and limited access to credit

4. A workforce unsuited to the demands of businesses
5. Unfair competition from imported products.
6. A lack of support for small and medium sized enterprises (SME's).

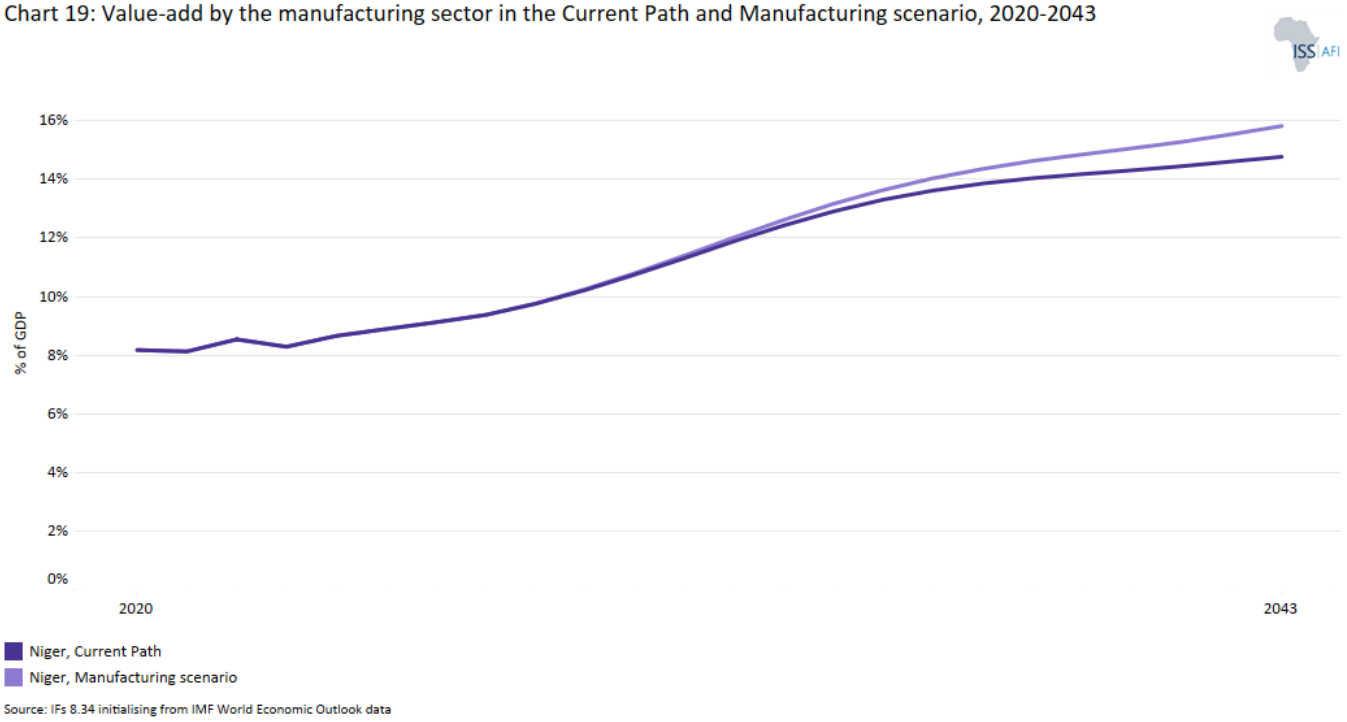
The PDES 2022-2026 stipulates five priority action areas to address these challenges:

1. Improve the production capacity of industrial and sem-industrial units
2. Reduce the costs of input factors for the sector
3. Improve the competitiveness of national products by promoting quality infrastructure
4. Strengthen mechanisms which protect consumers and businesses against counterfeiting
5. Conduct studies on the value chains of agro-sylvo-pastoral and fisheries production.

The development plan further aims to improve the conditions for the processing of Niger's agricultural products to form part of higher-value chains, such as those related to peanuts, meat, fish, honey, milk, leather and animal skins. Key interventions include the improvement of conservation efforts, construction of storage facilities, building and adequately equipping processing plants, construction of service roads and developing innovative marketing systems.

Despite the challenges, manufacturing as a share of GDP will grow steadily over the forecast horizon: by 2030, manufacturing will contribute 10.8% to GDP and 14.8% by 2043. Services will come to dominate the economy, equating to 45.9% of GDP by 2030 and 50% by 2043, while materials will experience steady growth to reach 8.9% of GDP by 2030 and 13.2% by 2043. Agriculture will continue to grow in absolute terms, but decline sharply in its contribution to GDP: by 2030, the sector will constitute 26.7% of GDP, before declining further to 15.2% by 2043.

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



Source: IFs 8.34 initialising from IMF World Economic Outlook data

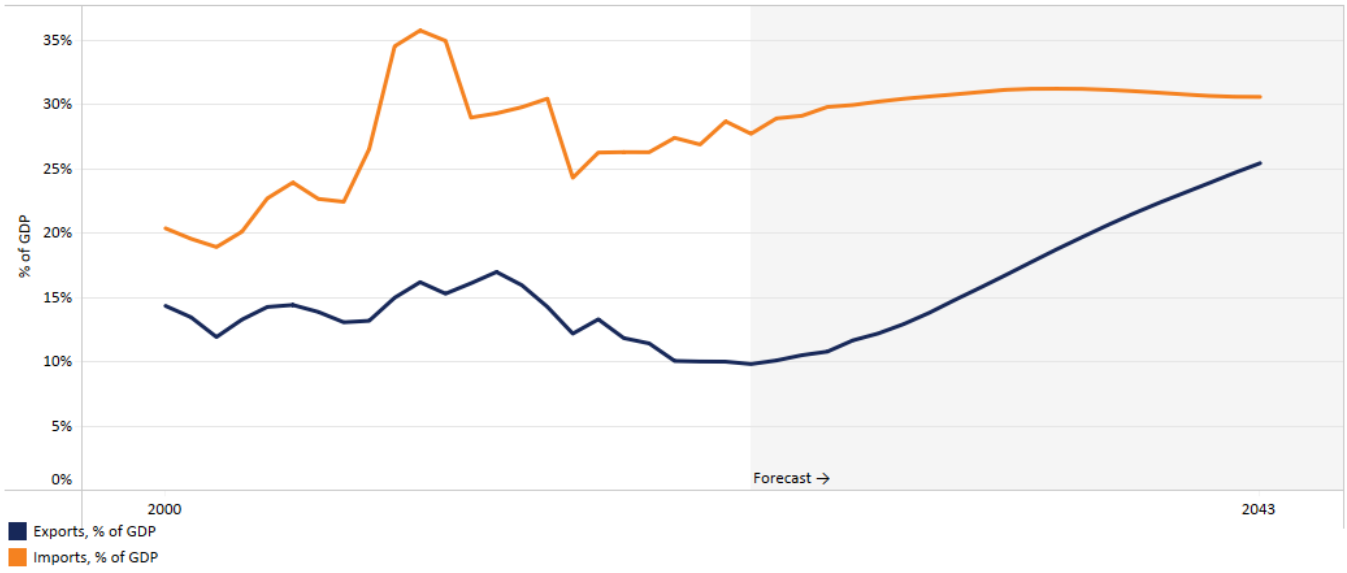
Chart 19 presents the contribution of the manufacturing sector to GDP in the Current Path and in the Manufacturing scenario, from 2020 to 2023. The data is in US$ and % of GDP.

The manufacturing sector in Niger faces a number of key challenges which will continue to subdue industrial activity if they are not solved in the short term. High input costs, a lack of clear industrial policy and certification standards, prohibitive taxation, low levels of competitiveness compared to import products and corruption all stymie growth in manufacturing output. The government must address these challenges through solutions that promote agro-processing, first by optimising agricultural output as depicted in Chart 14, and subsequently laying the foundation for agricultural processing that plugs the country into high-value chains in the region. Furthermore, no manufacturing sector reforms will succeed without the creation of adequate transport and energy infrastructure, which must be a priority.

In the Current Path, the manufacturing sector will grow from US$1.2 billion in 2023 to US$2.5 billion by 2030 and US$7.6 billion by 2043. This growth will translate to the sector contributing 10.8% to GDP by 2030 and 14.8% by 2043. In the Manufacturing scenario, the sector will grow to US$2.6 billion by 2030 and US$8.8 billion by 2043, equating to US$1.2 billion more than in the Current Path. As a share of GDP, the manufacturing sector will reach 10.8% by 2030 but grow to 15.8% by 2043, a percentage point increase over the Current Path.

AfCFTA scenario

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



Source: IFs 8.34 initialising from WDI data

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.

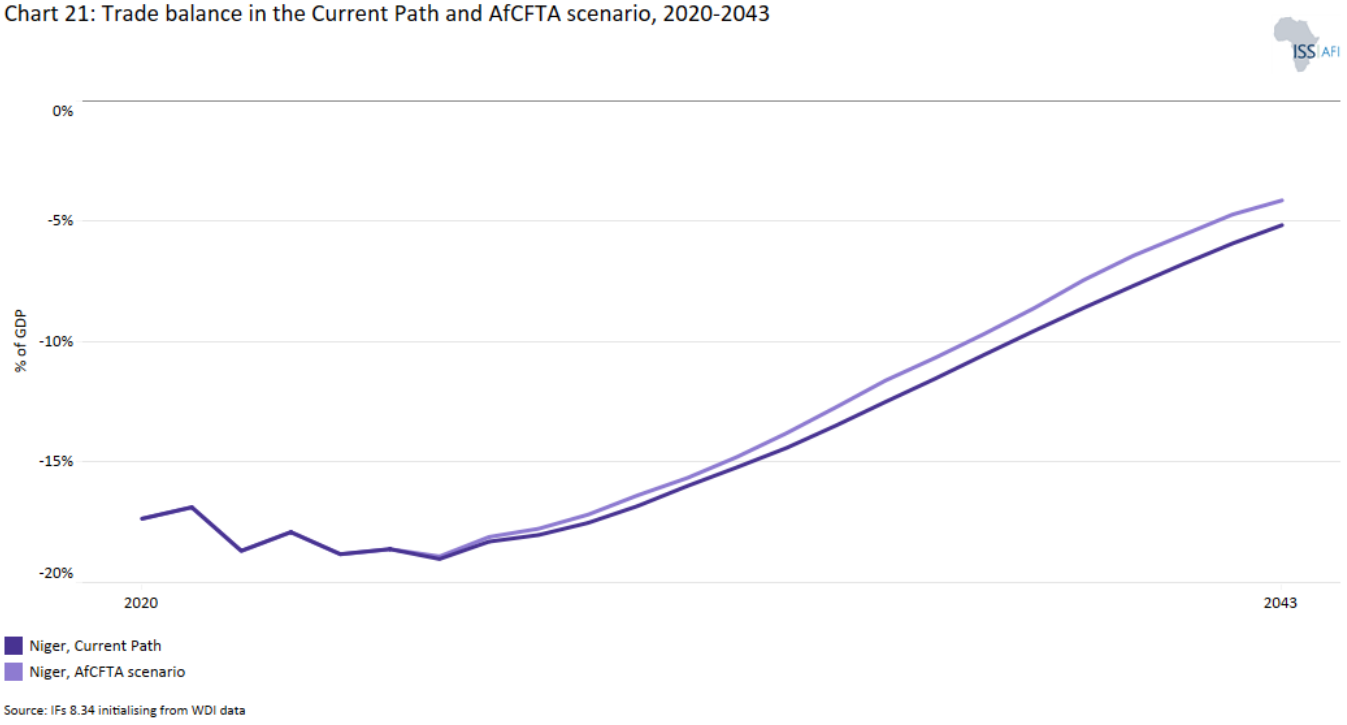
Similar to many African countries, Niger depends heavily on the export of commodities, with gold dominating export earnings, while vegetable, mineral and chemical products contributing to a much smaller extent. Conversely, the top imports are diversified amongst manufactured goods such as electrical and mechanical machinery, transport equipment and weapons, and primary goods such as rice, tobacco and pasta, highlighting the need to import foodstuffs to meet local agricultural food demand. Due to increasing world demand and relatively high efficiency, there are opportunities to increase exports of vehicles, surveying equipment, woven fabrics and processed food and vegetable products.

The Nigerien economy remains relatively closed for trade. Total trade as a percentage of GDP stood at 37.5% in 2023, ranking 8th lowest in Africa. The lower levels of trade are due to the small amount of exports leaving the country: in 1990, exports stood at US$0.6 billion, only increasing to US$1.5 billion by 2023. Conversely, imports rose from US$0.8 billion in 1990 to US$4.2 billion by 2023, a trend which explains why imports equated to 27.7% of GDP in 2023 compared to 9.8% for exports. Over the forecast horizon, exports will grow rapidly, reaching 13.8% of GDP by 2030 and 25.4% by 2043, while imports will grow and then plateau at 30.6% from 2030.

Trade with regional partners remains important for Niger, with 28.6% of exports flowing to other African countries in 2021, mainly ECOWAS country states. The majority of intra-Africa exports are mineral fuels, at 58% in 2020, followed by edible

vegetables at 6% and animal or vegetable fats at 5%. The other members of the AES, Mali and Burkina Faso, were the main destinations of intra-Africa exports in 2020, at 35% and 25% respectively. As these three states exit ECOWAS in January 2025, the intensity of trade between them and other African states is likely to increase as they lose preferential access to the markets of ECOWAS member states.

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



Source: IFs 8.34 initialising from WDI data

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

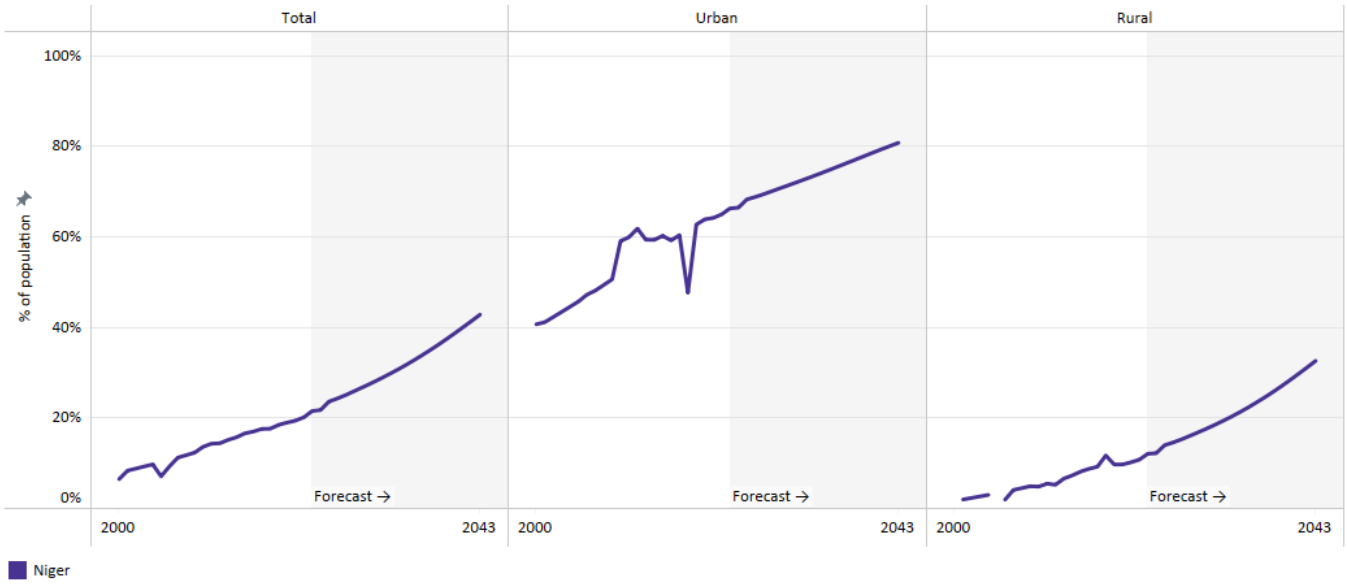
Niger's trade balance has been in a structural deficit since independence, with the smallest deficit being 0.7% of GDP in 1986, before gradually increasing to 17.9% by 2023. In the Current Path, the trade balance will remain in a deficit over the forecast horizon, but will become smaller, so that by 2030 it will be 16.8% and by 2043 it will decrease further to 5.2%.

The impending withdrawal from ECOWAS could have a negative effect on Niger's trade with regional partners, if tariff-free access is rescinded after the withdrawal process ends in July 2025. A transitional period between the official withdrawal data of 29 January 2025 and 29 July 2025 provides mediators from ECOWAS the opportunity to negotiate how the movement of goods and people will take place after the withdrawal. Niger, alongside Burkina Faso and Mali, announced in December 2024 that they will continue to give ECOWAS citizens visa free entrance and residency rights, thereby preserving the free movement of people established under ECOWAS protocols.

The greatest and most immediate benefit Niger can gain from fully implementing the AfCFTA is to continue trading tariff free with ECOWAS member states, even as the country finalises its withdrawal from the regional economic community. Furthermore, the challenge of a small domestic market will be overcome, while the country has 10 years to reach 90% liberalisation, while it has 13 years to fully phase out tariffs on sensitive products, given its status as a Least Developed Country (LDC) as defined by the United Naitons. This will give time for those industries, and the workers in those sector, who were previously protected by tariffs, to become more competitive before free access is given to external actors.

Large Infrastructure and Leapfrogging scenario

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



Source: IFs 8.34 initialising from WDI data

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

Transport infrastructure in Niger is limited to three international airports, three national airports and 19 000 km road network, of which 21% is paved. The railway line between Niamey and Dosso that was completed in 2016 is derelict and not being used. The Current Path forecast is for the percent of paved roads to increase to 24.6% by 2030 and 28.4% by 2043.

Further, due to low road density and limited road traffic, financing the repair of the road network is a major challenge, with parts of the network impassable during the wet season. The managing authority for Niger's roads estimates that over 20% of its rural roads are in very poor condition, hindering rural access to markets and basic services. The negative effects of climate change will worsen the situation, as flooding and high temperature will further erode roads, increasing the need for timely maintenance. There is thus a need to build all-season roads in Niger, which would increase rural connectivity and provide access all year round. In 2019, only 33% of the rural population lived within 2km of such an all-season road, meaning only a third of the country's large rural population had reliable access to urban centers.

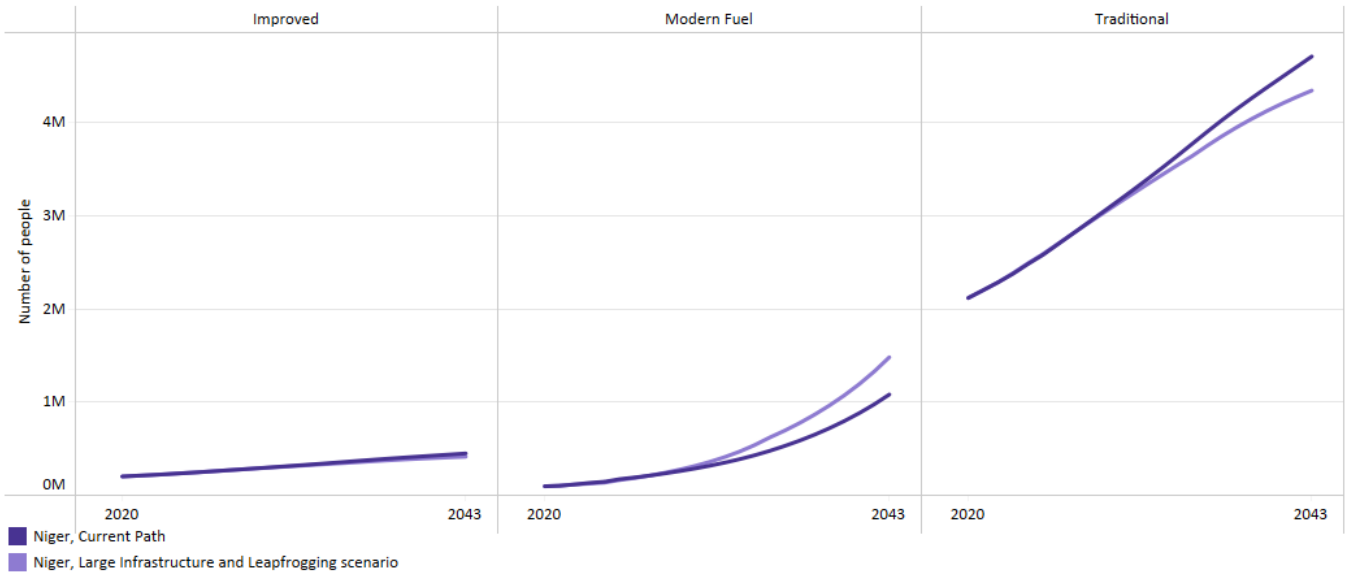
The second important infrastructure sector is the energy infrastructure sector, and more specifically, the level of electricity access in the country. In 2023, Niger had the 6th-lowest national electricity access rate in Africa, at 21.5%, with a large disparity between rural, 12.1%, and urban, 66.3%, access. Electricity production has been increased by 280% since 2000, from 206 GWh to 782 GWh by 2022, but Niger still imports 83.4% of its electricity supply from neighbouring countries, mainly Nigeria. Oil is the main source for electricity generation, contributing 68.7% of total production, followed by coal at 22.4%, natural gas at 5.9% and Solar PV at 3% in 2022. The Niger Solar Electricity Access Project (NESAP), funded by the World Bank, serves to connect isolated rural centres to reliable electricity supply, and has built 15 solar plants in the country, 12 of which were active as of July 2023. The state-owned Niger Electricity Co. has also recently released a tender

for a new 60MW solar PV plant, with funding coming from the African Development Bank (AfDB). The country has large solar potential and off-grid solar solutions would be a cost-effective way to close the gap between rural and urban electricity access.

In an effort to address these shortcomings, the Large Infrastructure and Leapfrogging scenario emulates ambitious investments in road and renewable energy infrastructure, improved electricity access and accelerated broadband and mobile connectivity. It emphasises adopting modern technologies to enhance government efficiency and incorporates significant investments in major infrastructure projects like rail, ports and airports 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.

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



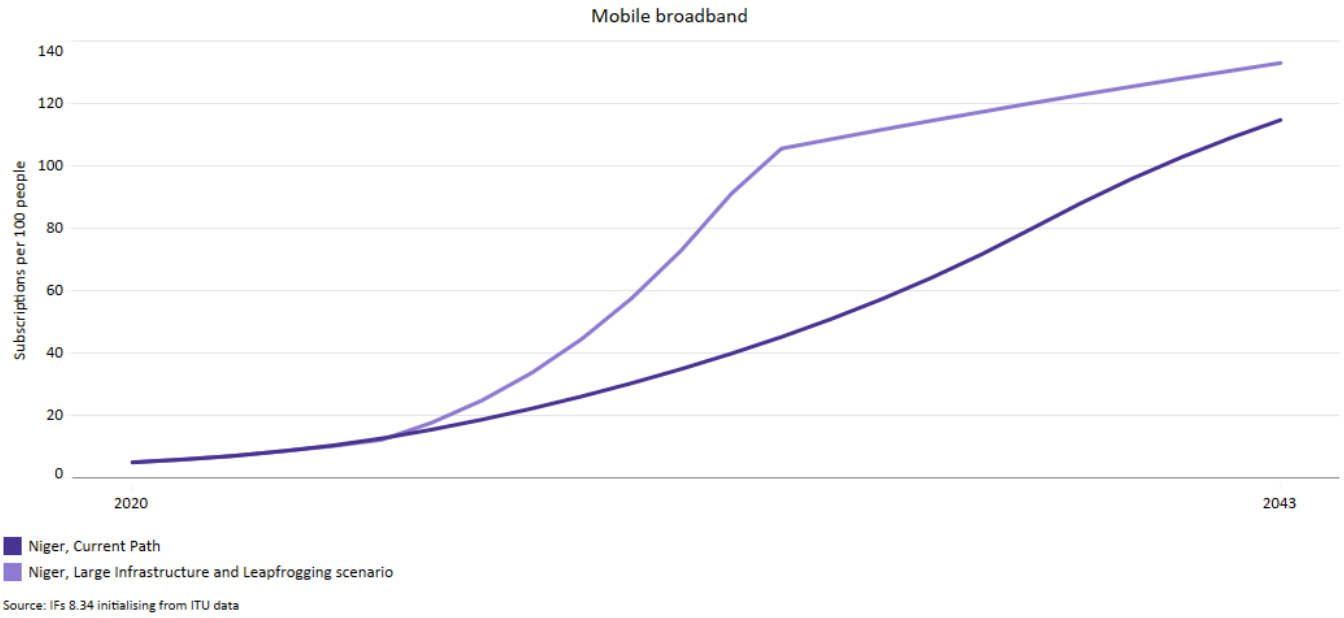
Source: IFs 8.34 initialising from IEA data

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.

In Niger, the reliance on traditional cookstoves remains high due to limited access to modern energy sources. In 2023, 2.4 million households used traditional cookstoves, while 0.1 million used modern fuels and 0.2 million used improved cookstoves. This reliance on biomass fuels, which consist of wood, charcoal and agricultural waste from crops and animals, contributes to deforestation, environmental degradation, and significant health risks, particularly for women and children who are exposed to indoor air pollution.

By 2043, in the Current Path, traditional cookstove use will increase to 4.7 million households. However, in the Large Infrastructure and Leapfrogging scenario, the number would be reduced to 4.3 million, with modern fuel use reaching 1.5 million households compared to 1.1 million under the Current Path. This transition will reduce health and environmental risks, improve energy access, and foster sustainable development in Niger.

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



Source: IFs 8.34 initialising from ITU data

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.

Mobile broadband access in Niger remains significantly below that of the rest of Africa and low-income countries. In 2023, Niger had only 8.6 mobile broadband subscriptions per 100 people, well below the 36.2 average for low-income African countries. Despite the rapid expansion of mobile broadband across the continent, Niger has struggled to keep up, partly due to the limited infrastructure and financial barriers in place. While mobile broadband access will improve, the infrastructure challenges remain substantial. By 2030, the Large Infrastructure and Leapfrogging scenario would push subscriptions to 57.6 per 100 people, compared to over 30 in the Current Path. In 2043, the Current Path will reach 114.7 subscriptions, while the Large Infrastructure and Leapfrogging scenario could boost access to 133 subscriptions per 100 people.

Fixed broadband is particularly important for businesses and greater government efficiences. It includes technologies such as fiber and satellite, offers greater reliability and higher speeds but faces more significant barriers in Niger. The country's vast, sparsely populated landscape presents a challenge for widespread fixed broadband infrastructure. Under the Large Infrastructure and Leapfrogging scenario, fixed broadband subscriptions could reach 4.8 and 22.5 per 100 people by 2030 and 2043, respectively, compared to 4.1 and 15.3 in the Current Path.

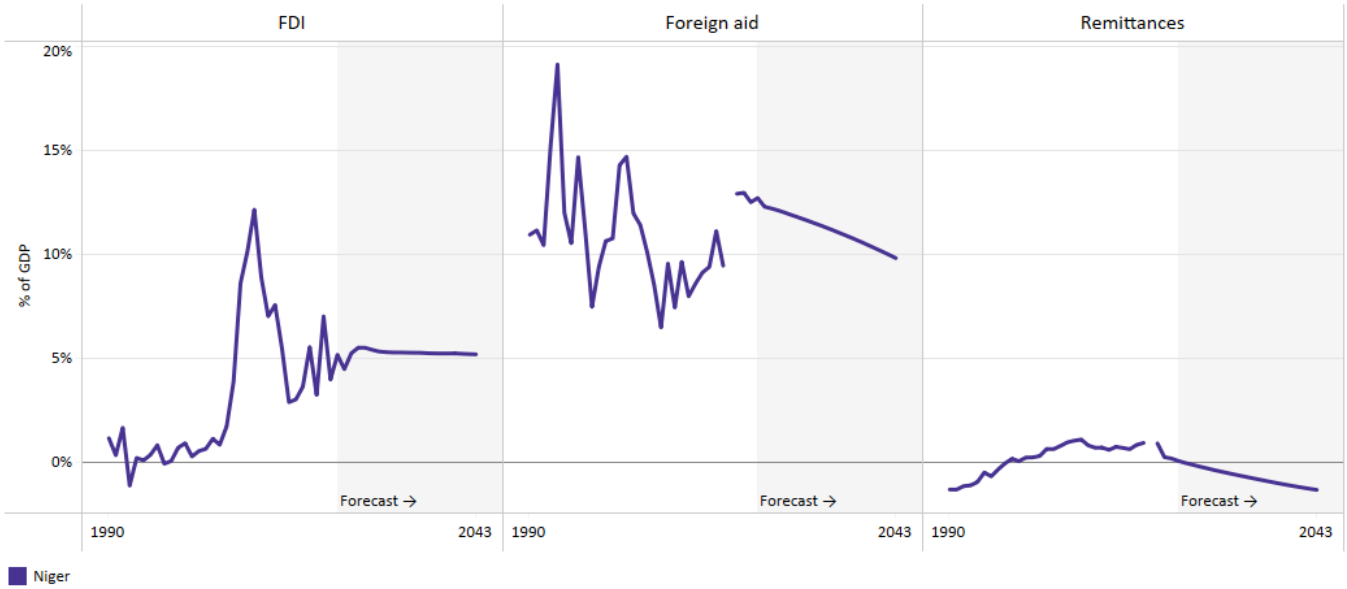
These limitations on broadband access have hindered both economic and social development in recent years. The lack of reliable internet access has affected key sectors such as education, business and governance. In rural areas, where access to services is already limited, the digital divide exacerbates inequalities, preventing citizens from fully participating in the economy and accessing essential services. The finalisation of an agreement between the Nigerien government and Starlink in October 2024, which is a network of low-orbit Earth satellites providing internet access to remote areas, will increase internet access, particularly in rural areas.

Improvements in broadband infrastructure, especially under the Large Infrastructure and Leapfrogging scenario, could significantly improve connectivity, foster economic growth and reduce inequality in the coming years. With better access,

Niger could enhance opportunities for digital innovation, education and government efficiency, creating a more connected and resilient economy. This will require substantial investment, but the recent agreement with Starlink serves as a major step forward towards this goal.

Financial Flows scenario

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



Source: IFs 8.34 initialising from IMF data

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.

Niger, as a low-income country with high poverty rates, has historically depended heavily on foreign aid to address critical development and humanitarian needs. Foreign aid has been pivotal for Niger, supporting programs in health, education, food security and infrastructure development. The exceptionally high levels of aid in 1994 (Chart 25) were driven by the economic challenges stemming from the devaluation of the CFA franc. This event caused significant inflation and exacerbated poverty, which increased the need for international assistance. Aid was critical in stabilising the economy and supporting essential services, such as health and education.

In 2023, foreign aid accounted for 12.7% of the country's GDP, totalling US$ 1.9 billion. This significant reliance underscores the country's continued vulnerability and dependence on external support for essential services and development programs. The Current Path indicates a slight reduction in aid dependency, with aid expected to contribute 9.8% to GDP in 2043, reflecting gradual efforts to diversify Niger's economy and build domestic revenue capacity.

However, the 2023 coup has disrupted international relations, with several key donors, including the World Bank, European Union and the United States, suspending aid and reassessing partnerships due to governance concerns. Niger's alignment with non-traditional partners, such as Russia, has further strained ties with Western donors, creating uncertainty about future aid and external development support for the country's development trajectory.

In 2023, net remittances contributed only 0.1% to Niger's GDP. This low figure reflects Niger's role as both a recipient and sender of remittances, where outbound remittances offset inflows. Remittances play a minimal role in the country's financial stability.

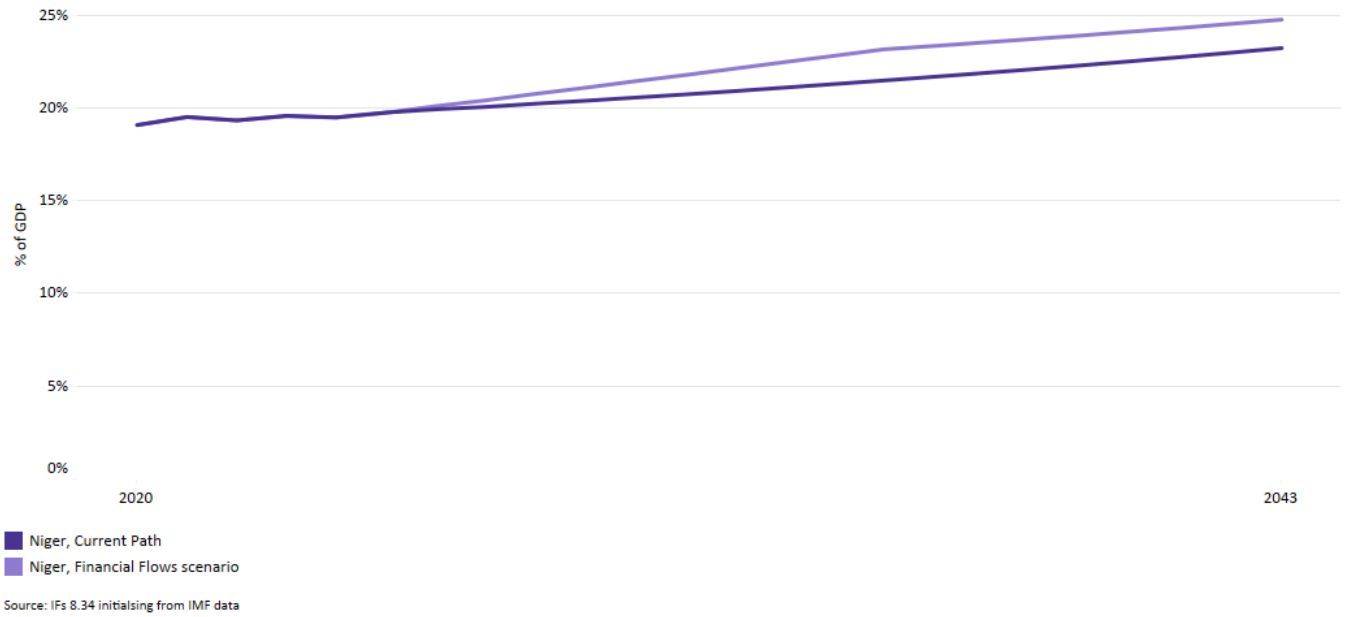
FDI in Niger was 12.2% of GDP in 2011, a high figure driven by optimism in the country's resource sectors, particularly

uranium, and efforts to improve infrastructure and attract investment following the 2010 coup. Despite political instability, foreign investors were encouraged by these opportunities. However, FDI began to decline in subsequent years, reaching 5.2% of GDP in 2023. This decline is attributed to political instability and governance changes, particularly the 2023 coup, which reduced investor confidence and increased economic uncertainty.

The Financial Flows scenario is a positive scenario which represents a reasonable but ambitious increase in inward flows of worker remittances, more aid 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. The scenario is premised on a return to constitutionalism which is very likely a precondition for a resumption of aid and FDI.

Visit the theme on Financial Flows for our conceptualisation and details on the scenario structure and interventions.

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



Source: IFs 8.34 initialsing from IMF data

Chart 26 presents government revenue in Niger for the Current Path and Financial Flows scenario, from 2020 to 2043, as a percentage of GDP.

In the Current Path, government revenue will increase from 19.6% of GDP in 2023 to 20.6% in 2030 and 23.2% in 2043. In the Financial Flows scenario, revenue will reach 21.4% of GDP in 2030 and 24.8% in 2043.

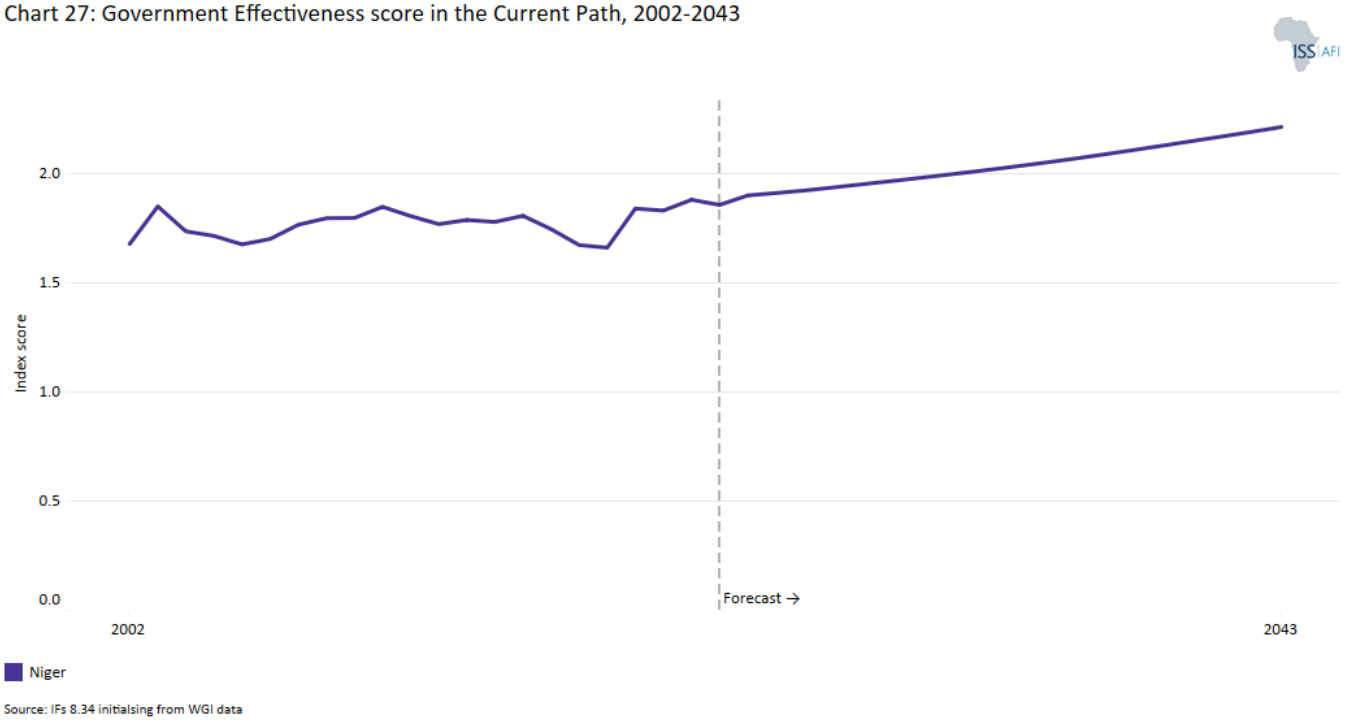
This growth reflects a positive association between capital inflows, such as foreign aid and FDI, and government revenue, driven by increased public services, tax compliance, and economic growth fueled by higher external investments. An inflow of capital into Niger raises the potential tax which can be collected, as foreign investors are usually more tax compliant and are subject to natural resource taxes. To benefit fully, the government must improve its tax collection capabilities, with local authorities currently struggling to efficiently and transparently collect taxes.

Niger's government also recognises the need for tax incentives to attract foreign investment and has put in place numerous tax breaks aimed at increasing capital inflows. Businesses that invest in their labour force through hiring and training local workers, and that invest in research and development activities will receive tax breaks from the government. These incentives will have a direct effect on government revenue, and care must be taken that the incentives are justified

through higher levels of investment in key sector and minimal loss to revenue. Not doing so can lead to distortions in the economy. The government's Investment Code states that tax incentives are available for a limited time and need to be negotiated on a case-by-case basis, thereby giving the state control over the number of businesses that benefit from these tax incentives.

Governance scenario

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



Source: IFs 8.34 initialsing from WGI data

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

Niger, like many countries in the Sahel, has long struggled with governance challenges characterised by political instability, corruption and weak institutional capacity. These have left the country vulnerable to internal and external security threats, including violent extremism spilling over from neighbouring regions such as Mali and Burkina Faso.

The country has experienced several attempted and five successful coups. Despite these setbacks, Niger has periodically transitioned back to democratic governance, including the establishment of the Fifth Republic in 1999. However, political stability remains fragile, as highlighted by the most recent coup in 2023.

The recurring coups have impacted governance, often stalling institutional progress, eroding public trust, and disrupting efforts to improve public service quality. Nonetheless, Niger has demonstrated some resilience through reforms in public administration and civil service quality, contributing to a degree of institutional stability despite external and internal pressures.

Good governance is crucial for economic progress, fostering an environment conducive to investment and sustainable development. Chart 27 displays the World Bank's governance effectiveness index, which captures perceptions of public service quality, civil service independence, and policy credibility. It's important to note that the World Bank index does not account for security challenges, focusing instead on institutional factors.

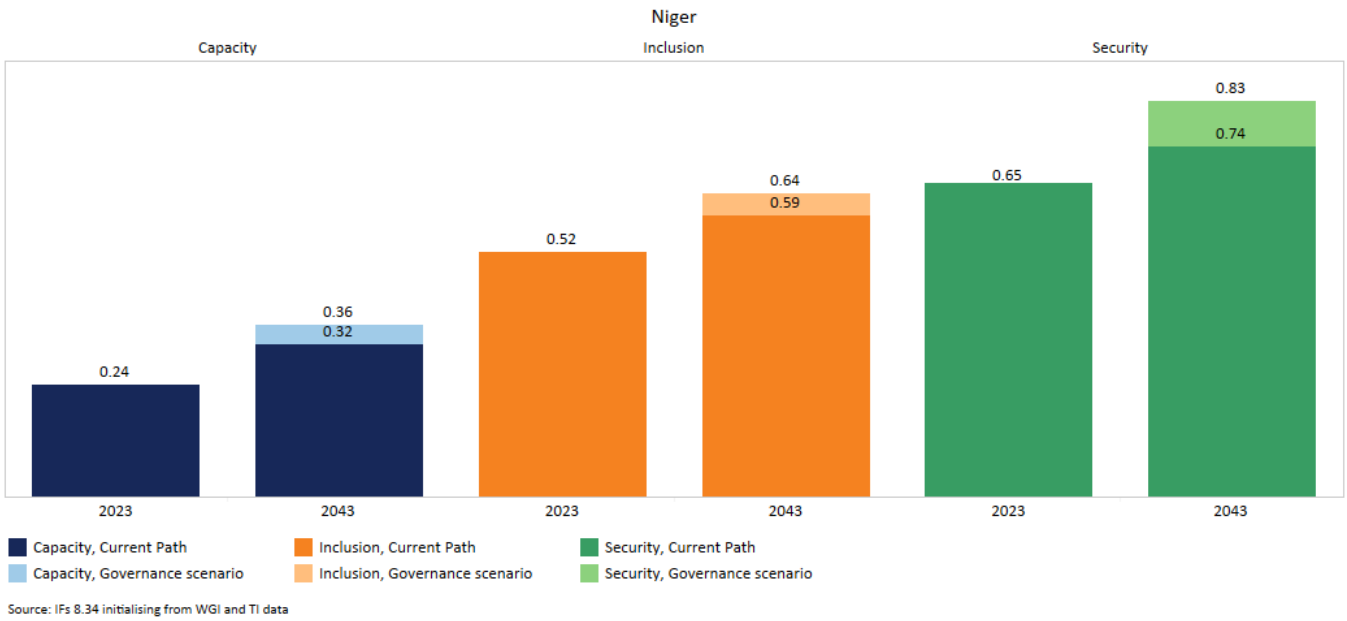
Despite persistent challenges, Niger's governance effectiveness score of 1.85 out of 5 in 2023, albeit very low, reflects a measure of improved performance compared to neighbouring countries such as Mali and Chad. This higher performance compared to its neighbours is attributed to a relatively stronger civil service and greater political stability than its neighbouring peers (measured before the 2023 coup).

While Niger's governance effectiveness has shown resilience in navigating repeated coups (showing small fluctuations in the chart), the recent leadership change and growing regional instability could exacerbate governance difficulties, delay reforms and worsening security conditions.

Forecasts indicate gradual improvement, with the score expected to reach 2.0 by 2030 and 2.2 by 2043, positioning Niger above the average for low-income Africa. This trajectory reflects Niger's ongoing efforts to strengthen governance and improve civil service quality. However, its score remains lower than the global average of 3.1, highlighting the persistent impact of regional challenges.

The 2024 Ibrahim Index of African Governance (IIAG) ranks Niger 24th out of 54 African countries, above the low-income regional average, signalling some resilience despite security and governance difficulties. The IIAG evaluates governance across multiple indicators, including political stability, safety, and human development. While it highlights Niger's challenges, the IIAG also points to gradual improvements, particularly in political stability and the civil service, all of which predate the 2023 coup.

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



Source: IFs 8.34 initialising from WGI and TI data

Chart 28 illustrates the security, capacity, and inclusion indices under the Current Path versus the Governance scenario for 2023 and 2043, showcasing the potential for enhanced governance performance over time. For further details on the conceptual framework and scenario interventions, refer to the Governance theme.

Governance in our modelling is conceptualised along three key dimensions—security, capacity, and inclusion—reflecting the traditional sequencing of state formation. Each dimension is scored on an index ranging from 0 (poor) to 1 (excellent), with higher scores indicating improved governance outcomes.

The security dimension evaluates the probability of intra-state conflict and the general level of risk, reflecting a state's ability to maintain stability. The capacity dimension relates to government revenue, corruption, regulatory quality,

economic freedom, and government effectiveness, capturing the efficiency and effectiveness of state institutions. Finally, the inclusion dimension measures the level of democracy and gender empowerment, highlighting the inclusiveness of governance structures.

The Governance scenario assumes improved outcomes across these three dimensions—stability, capacity, and inclusion—and measures progress using their average score. This scenario also incorporates increased government spending on social protection to shield vulnerable populations, financed through taxation rather than borrowing, emphasizing fiscal sustainability.

Niger's low inclusion index score, which stood at 0.52 in 2023, reflects challenges in both democratic participation and gender equality. This value, already indicative of limited inclusivity, has deteriorated since the 2023 coup. The military-led government has suppressed political parties and placed restrictions on press freedom which have undermined democratic principles such as representation, accountability and transparency. The country also faces significant gender inequality, as reflected by its position at the bottom of global rankings like the UNDP's Gender Inequality Index (GII), where it trails even its regional peers in sub-Saharan Africa. Cultural and institutional barriers, such as limited access to education for women contribute to systemic inequality. The country also has the highest rate of child marriage in the world, with 66% of girls aged between 15 and 19 years having been or still married, divorced, widowed or in an informal union.

Niger's capacity index was critically low at 0.24 in 2023, reflecting significant challenges in tax revenue mobilisation and corruption control. The 2023 coup further weakened institutional capacity as the military-led government prioritised consolidating power over governance reforms, leading to inefficiencies and reduced public service delivery.

Niger's security index stood at 0.65 in 2023, indicating relative stability compared to its other governance dimensions. However, the 2023 coup exacerbated internal instability, with heightened risks of domestic unrest and reduced capacity to address violent crime and regional security threats. This has eroded progress made in maintaining stability over the preceding years.

Without a clear, inclusive roadmap for restoring democracy and prioritising gender equity, Niger's inclusion index is likely to remain on a downward trajectory.

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