



United Nations  
Economic Commission for Africa

COUNTRY PROFILE

2016



**BURUNDI**





United Nations  
Economic Commission for Africa

# COUNTRY PROFILE **2016**



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## Note

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## Abbreviations and acronyms

BRB	Bank of the Republic of Burundi
CNDD-FDD	National council for the defence of democracy/Force for the defence of democracy
COMESA	Common Market for Eastern and Southern Africa
CSU	Universal health cover
EAC	East African Community
ECCAS	Economic Community of the Central African States
EDS	Demographic and health survey
FAO	United Nations Organization for Food and Agriculture
GDP	Gross domestic product
UNHCR	Office of the United Nations High Commissioner for Refugees
IFDC	International Fertilizer Development Center
ISABU	Agricultural Research Institute in Burundi
ISTEEBU	National Institute of Statistics and Economic Studies of Burundi
MINAGRIE	Ministry of Agriculture and Livestock
OECD	Organization for Economic Cooperation and Development
PMTCT	Prevention of mother to child transmission
PNIA	National agricultural investment programme
SONU	National emergency obstetric and neonatal services
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFPA	United Nations Population Fund
UNICEF	United Nations Children's Fund
WFP	World Food Programme





# Acknowledgements

Country Profiles is a series published annually by the Economic Commission for Africa (ECA). The aim of the series is to disseminate country- and region-specific policy analyses and recommendations for economic transformation, with an emphasis on promoting sustainable growth and social development, strengthening regional integration and facilitating development planning and economic governance. The present series is the result of the close collaboration of the subregional offices of ECA and the African Centre for Statistics. Specific contributions were provided by relevant programme areas of ECA, in particular, the Macroeconomic Policy Division, the Regional Integration and Trade Division, and the Social Development and Policy Division.

The country profile on Burundi was prepared under the overall coordination and substantive guidance of Giovane Biha, Deputy Executive Secretary for Knowledge Delivery of ECA. The main authors of the Burundi country profile were Andrew Mold, Acting Director of the ECA Subregional Office for East Africa and Priscilla Lecomte of the subregional office. Substantive contributions were made by David Boko of the African Centre for Statistics in data quality evaluation.

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A special mention goes to the Publications Section for ensuring the editing, translation, design and printing of the 2016 Country Profiles series.

# Burundi at a glance

General information		Rankings	
Subregion	East Africa	Human development index (United Nations Development Programme)	184/188 (2015)
Official language	Kirundi, French	Gender inequality index (United Nations Development Programme)	109/155 (2015)
Currency	Burundi Franc (BIF)	Ibrahim index of African governance (Mo Ibrahim Foundation)	43/54 (2015)
Capital city	Bujumbura	Ease of doing business index (World Bank)	157/189 (2016)
Regional Economic Community membership (s)	COMESA, ECCAS, EAC	Corruption perceptions index (Transparency International)	159/176 (2016)



## Economic growth

The gross domestic product (GDP) of Burundi declined by 3.9 per cent in 2015 as a result of the sociopolitical crisis affecting the country. This crisis brought to an end a decade of economic stability with average growth of 4.5 per cent per annum. In 2016, in a still difficult context, recovery is slow and growth is estimated at 0.7 per cent of GDP. In 2015, the sectors which experienced the greatest decline were construction (-35 per cent), energy (-10 per cent), trade (-9 per cent), hotels and catering (-6 per cent) and agriculture (-3.9 per cent). Agriculture contributed 36 per cent to GDP. On the other hand, the administration and transport sectors continued to grow modestly.



## Fiscal policy

The deterioration of public finances which began in 2014 continued in 2015. Resources decreased by 16 per cent, notably because of the suspension of budget support and falling revenue, while expenditure decreased by only 6 per cent; the impact was most severe in relation to investments (-43 per cent). The budget deficit stood at 5.7 per cent of GDP in 2015.



## Monetary policy

The inflation rate was brought relatively under control, with a price increase in the order of 5.6 per cent in 2015, but prices of foodstuffs went up by about 10 per cent. Access to credit continues to be very restrictive with an average borrowing rate of 16.9 per cent. The foreign exchange reserves plunged by about 41 per cent in 2015, amounting to only 2.3 months of imports, and the foreign exchange market remained tight.



## Current account

The trade deficit amounted to 22 per cent of GDP in 2015, a modest improvement compared with 24.5 per cent in 2014. Sixty per cent of the country's exports consist of tea and coffee sales, but the share of manufactured goods is rising (31 per cent of exports in 2015, compared with only 8 per cent in 2011). Asia has become the principal supplier of Burundi (42 per cent of imports). Furthermore, 12 per cent of Burundian exports and 19 per cent of its imports occur within the East African Community (EAC).



### Capital and financial accounts

Foreign direct investments fell from \$47 million in 2014 to \$7 million in 2015 following the sociopolitical crisis. In addition, although foreign debt decreased slightly to amount to only 15 per cent of GDP, domestic public debt increased sharply by 45 per cent in one year and amounted to 23.3 per cent of GDP.



### Demography

With a population of 10.1 million people and a density of 379 inhabitants per km<sup>2</sup>, Burundi is one of the most densely populated countries in Africa. However, the population growth rate, estimated at 3%, remains very high.



### Poverty

Per capita GDP was estimated in 2015 at \$276 compared with \$285 in 2014, a decline of 3.5 per cent. Pro-poor policies implemented during the last decade enjoyed some modest success (64.6 per cent in 2014 compared with 67.5 per cent in 2006).



### Employment

The rate of youth unemployment continued to be very high, around 50 per cent among people under 30. More than 4 million Burundians were affected by the floods, landslides and rains of 2015, making the population even more vulnerable. The number of people needing humanitarian assistance climbed from 1.1 million in February 2016 to 3 million in November 2016, under the combined impact of natural disasters and the political crisis.



### Health

The child mortality rate decreased by 38 per cent over the last decade. This was achieved by an increase of 181 per cent in public spending allocated to health during this period. Nevertheless, the maternal mortality rate remained high (500 per 100 000 live births); the level of food insecurity affecting 46 per cent of the population increased by 11 per cent in the last two years.



### Education

The Government has made enormous efforts to improve education. Public spending allocated to the sector represents 19 per cent of the budget and the net enrolment ratios in the primary sector (95.6 per cent) and the secondary sector (27.1 per cent) respectively are on the rise. Nevertheless, there are still many problems, notably that of the quality of education.



### Gender

According to the African gender and development index, although Burundi achieved satisfactory parity figures in the health, employment and education sectors, significant inequalities persist in relation to access to land and credit.



## Overview

The Burundian economy has been affected by political tensions which have had an impact on the country since April 2015, although the precise scale of this impact is still difficult to measure. The GDP growth rate declined by -3.9 per cent in 2015 (Bank of the Republic of Burundi (BRB), 2016b) and the recession appeared to continue in 2016. In addition to the deterioration of the macroeconomic indicators, political instability combined with heavy floods at the end of 2015 took their toll on the humanitarian situation of Burundi, with more than 325,000 people taking refuge in neighbouring countries and 110,000 persons being internally displaced (Office of the United Nations Commissioner for Refugees (UNHCR), 2016 and the United Nations Office for the Coordination of Humanitarian Affairs, 2016b)<sup>1</sup>.

In a context characterized by decreased tax revenue and the suspension of foreign budget support, the Government has been forced to reduce its investment efforts and to increase public debt, which has become indispensable in covering recurrent fixed expenditures.<sup>2</sup>

Between 2005 and 2014, a stable growth rate of about 4.5 per cent, although lower than the regional average, had allowed Burundi to start achieving good results in macroeconomic policy and the fight against poverty. Structural reforms had been launched for this purpose. They were part of the strategic development programme "Vision 2025" (Republic of Burundi, 2011), whose goal was to reduce poverty by half, estimated in 2011 at 67 per cent, on the basis of three main objectives: (i) establishing good governance under the rule of law; (ii) developing a strong and competitive economy; (iii) improving of the quality of life of Burundians.

Progress made was principally expressed by a significant increase in per capita income (from \$106 in 2003 to \$285 per capita in 2014). There was also a marked drop in the inflation rate (5.6 per cent in 2015 compared with 18.4 per cent in 2012), and a substantial improvement in the business environment. In 2015, Burundi was ranked eighteenth out of 184 countries for business creation by the Doing Business index (World Bank, 2016a). According to the African Social Development Index, Burundi

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<sup>1</sup> Of 110,000 internally displaced persons, 42,000 had been forced to abandon their homes as a result of natural disasters.

<sup>2</sup> Interview with ISTEERU, August 2016.

experienced positive development between 2005 and 2010, with human exclusion falling by 21 per cent, although the overall figure remained high.

Nevertheless, these encouraging results were not sufficient to achieve the goals of alleviation and rapid reduction of poverty which still affected 64.6 per cent of the population in 2014 compared with 67.1 per cent in 2006. This was due to the fact that the growth rate over the last decade, although steady, was too low to achieve the country's development goals. Moreover, Burundi faced many obstacles which called for more extensive structural reforms. Although "Vision 2025" is still the strategic document for action by the Government, the achievement of its goals seems to be severely compromised by the current sociopolitical crisis.

In its thematic segment, the present publication looks at the need to improve the productivity of the agricultural sector to achieve the structural transformation of the Burundian economy, an effort which involves both the modernization of subsistence farming to achieve food self-sufficiency and the diversification of export crops and agribusiness, while at the same time dealing with the problem of land and demographic pressure on the land and environmental risks.

**Box 1: What are the socioeconomic consequences of the current political crisis?**

Since 2000, Burundi has been engaged in a phase of political transition guided by the Arusha peace agreements which brought to an end the civil war which had lasted almost a decade. The current political crisis broke out on 25 April 2015, when it was announced that the president in office, Pierre Nkurunziza, had been named as a candidate in the presidential election by the ruling party, CNDD-FDD. The elections were finally held on 21 July 2015 when Pierre Nkurunziza was declared the winner with 69.41 per cent of the vote. Since then, notwithstanding mediation efforts led by the East African Community (EAC), the principal donors suspended their direct budget support and at the same time, Burundi announced its withdrawal from the International Criminal Court and the end of its cooperation with the Office of the United Nations High Commissioner for Human Rights.

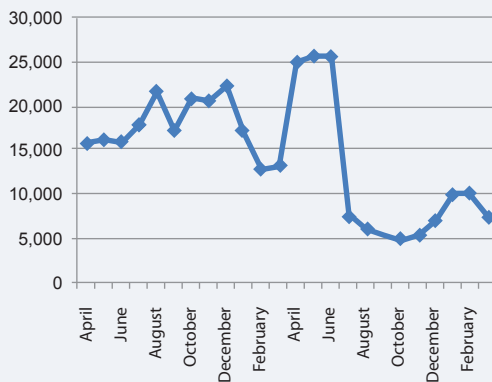
At the macroeconomic level, the crisis resulted in a recession in 2015, which continued into 2016. The formal economy, concentrated in Bujumbura, was the first to be affected, while the rural population dependent on the informal subsistence economy was mainly affected by the reduction in public spending and investment. The impacts of the crisis in the medium term on the overall poverty level are still difficult to assess.

The decline in the growth rate affected the status of public finances: the resources available to the State fell by 16 per cent in 2015 compared with 2014, pursuant first to the suspension of foreign budget support and, second, to decreased tax revenue against a background of economic slowdown in every production sector (-8 per cent over the year). Faced with a drop in its resources, the Burundian Government decided to maintain current spending (salaries in particular), while reducing public investments (-43 per cent in 2015), until then one of the main drivers of growth. The budget deficit also increased, standing at 5.7 per cent of GDP in 2015 compared with 4.1 per cent in 2014 (BRB, 2016a).

Although the level of inflation seems to have been brought under control (5.6 per cent in 2015), whereas a strong increase might have been expected, other sources suggest a more robust increase in food prices in Bujumbura, with localized shortages. The same is true of the official exchange rate which seems, by some anomaly, not to have succumbed to this wave of instability, increasing the gap between the official rate and the black market rate. In this context, foreign exchange reserves decreased sharply in 2015 by some 41 per cent in relation to 2014 (UNDP, 2016a)

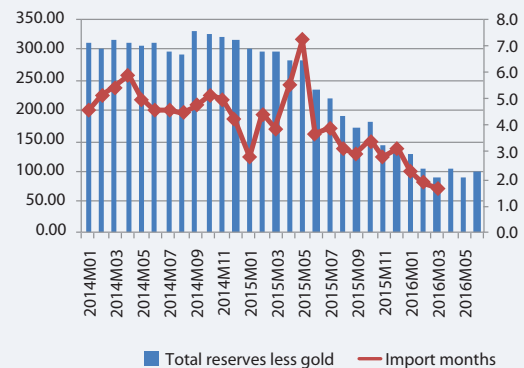
In addition to the economic indicators, the country's political instability had an impact on the humanitarian situation. The level of food insecurity rose from 31 per cent of households in 2014 (World Food Programme) to 35 per cent in 2016 (WFP 2016), after several years of improved food security.

**Figure A: Monthly fiscal expenditure April 2014-March 2016 (in millions of BIF/three-month moving average)**



**Data:** Bank of the Republic of Burundi, BRB (2016a)

**Figure B: International reserves (millions of United States dollars) in relation to imports**



**Data:** International Financial Statistics, IMF (2016)

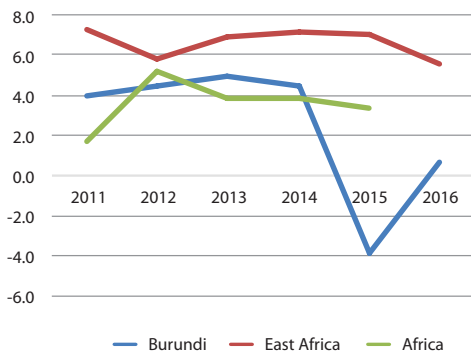
# 2

## Regional context

For Burundi, a landlocked country situated at the junction of Central and East Africa, with a domestic market of about 10 million people<sup>3</sup>, regional integration, particularly into the East African Community (EAC) offers a potential driver for economic growth. Regional integration is regarded as a way to gain access to a more extensive market of about 146 million people (EAC, 2015) and to reduce the high production costs associated with the country's landlocked situation.

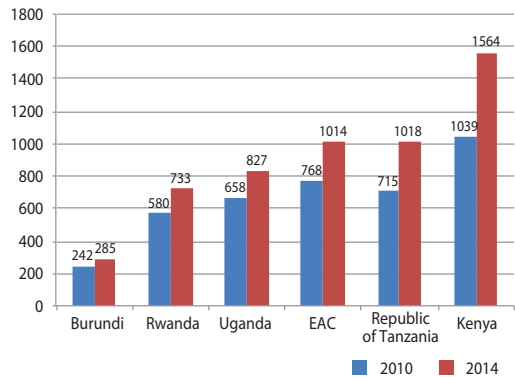
Compared with the other countries of the subregion, Burundi is experiencing low economic growth (figure 1) and also greater demographic pressure with a natural increase of 3 per cent in 2014, higher than the EAC average of 2.6 per cent (EAC, 2015)<sup>4</sup>. In comparison with the other countries of East Africa, Burundi has a lower per capita GDP, valued at \$285 in 2014 and \$242 in 2010, which is almost 75 per cent lower than the EAC average (figure 2).

**Figure 1** Growth rate of real gross domestic product



Source: BRB (2016a) and EAC (2015)

**Figure 2:** Per capita GDP, 2010 and 2014



Source: EAC (2015)

<sup>3</sup> The general population and housing census of 2008 (RGPH-2008) had counted 8, 053574 inhabitants and the forecasts of the Institute of Statistics and Economic Studies of Burundi (ISTEEBU) estimated the population of Burundi as 10,114,505 in 2016.

<sup>4</sup> According to EAC, the demographic growth rate is 3 per cent.

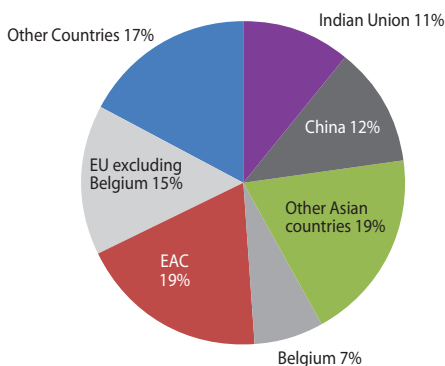


Notwithstanding the weakness of its foreign trade, mainly caused by its low volume of exports, Burundi has enormous potential for regional trade owing to its interface between East Africa and the Democratic Republic of Congo in the west of the country. The Democratic Republic of the Congo is already the top customer of Burundi, taking 24 per cent of the total value of exports in 2015, while over the last five years (2010-2014), the EAC countries have on average absorbed 25 per cent of the total trade value (BRB, 2016c).

When Burundi joined EAC in July 2007, it became possible to achieve a significant reduction in certain costs related to its landlocked situation, particularly through the harmonization of customs duties. Nonetheless, the non-tariff obstacles, maintaining anti-competitive practices, the distance to trade platforms and the poor quality of the infrastructure continue to restrict the development of regional trade. Nevertheless, regional projects are under way, particularly the regional hydroelectric project of Rusumo Falls, among Rwanda, the United Republic of Tanzania and Burundi (Nile Basin Initiative)<sup>5</sup>.

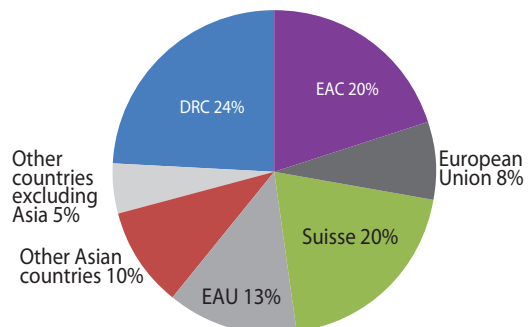
Notwithstanding these constraints, intraregional trade significantly increased with effect from 2007, rising from \$84.8 million in 2007 when Burundi joined EAC to \$379 million in 2013 (EAC, 2015). It should be noted that a substantial part of intraregional trade is conducted on an informal basis and cannot be measured. According to data supplied for 2015 by ISTEEBU (2016c), the share of trade with the subregion does not seem to have been affected by the crisis. Estimated at 20 per cent of exports in 2015, the EAC share stood at 23 per cent in the first quarter of 2016 (figure 4). The Democratic Republic of the Congo remains, however, the principal customer of Burundi. In the subregion, Kenya and Rwanda are its principal export destinations<sup>6</sup>.

**Figure 3: Imports by country of origin 2015**



**Source:** ISTEEBU (2016c) and ECA calculations.

**Figure 4: Exports by country of destination 2015**

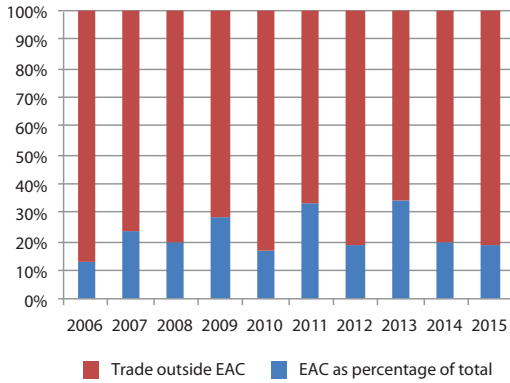


**Source:** ISTEEBU (2016c) and ECA calculations.

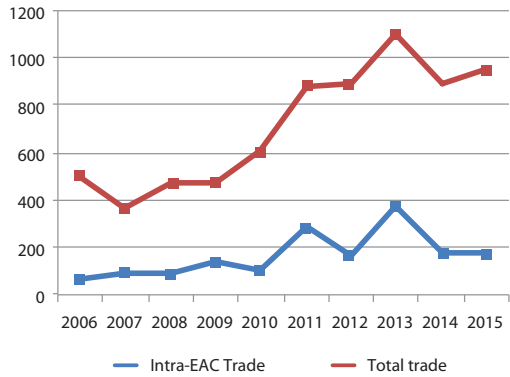
<sup>5</sup> The project should be able to produce 80 MW. Initially scheduled for the first quarter of 2015, construction was delayed. In September 2016, the land preparations and calls to tender were in progress. The construction of a high-voltage line between the Ruzizi dam in the Democratic Republic of the Congo and Burundi is also under way.

<sup>6</sup> The status of Rwanda as a principal export destination may have changed in 2016 as the result of restrictions placed on exports to the country.

**Figure 5:** East African Community, international and regional trade (millions of United States dollars) 2006-2015



**Figure 6:** East African Community contribution to total trade 2006-2015



Source: EAC (2016).

The East African Community share of imports accounted for between 19 and 25 per cent of total imports of goods between 2012 and 2016 (Figure 3, Ministry of Finance, 2014). Kenya and the United Republic of Tanzania are the two main suppliers of Burundi in the subregion.

Products traded regionally are mainly locally manufactured goods (such as soap, beer, cigarettes, etc.) providing a significant outlet for the development of the secondary sector in Burundi, unlike international trade which is dominated by cash crops with no added value.

## Box 2: Africa regional integration index - Burundi

The Africa regional integration index is designed to measure how well each country in the continent is meeting its commitments under pan-African integration frameworks, such as Agenda 2063 and the Abuja Treaty. The index is a joint project of the African Development Bank, the African Union Commission and ECA. The index tracks the following dimensions: free movement of persons; trade integration; productive integration (development of regional value chains); regional interconnections; and infrastructure and macroeconomic policy convergence. The following section highlights selected indicators used to calculate the index.

### Overall rank:

Burundi achieves rather low rankings within EAC, COMESA and ECCAS, ranking respectively fourth, twelfth, and eighth in the overall performance index. It has a score of 0.48 within EAC, with Kenya achieving the best performance with a score of 0.66\*.

Free movement of persons	Trade integration	Productive integration	Infrastructure	Financial integration and macroeconomic policy convergence
Third in EAC (score : 0.7)	Ranked fifth in EAC (score of 0.5), the most successful country is Kenya with a score of 1.	Ranked fifth in EAC (score of 0.33), the most successful country is Kenya with a score of 0.84.	Burundi is the most successful country with a score of 0.84	Ranked fourth in EAC with a score of 0.03, the most successful country is Rwanda (score : 0.5).

**Free movement of persons:** At the time when the index data were compiled, Burundi had not ratified the relevant instruments; but that has since been done for EAC and the Community Market for Eastern and Southern Africa (COMESA). Burundi agreed that its nationals shall use an identity card to travel within EAC. All nationals of the member countries of EAC are authorized to enter Burundi visa-free, compared with 25 per cent of the nationals of the member countries of COMESA and just 20% of the nationals of the members of ECCAS.

**Trade integration :** Burundi applies an average tariff of about 1 per cent on imports originating from COMESA. During the period 2010-2013, imports originating from the rest of EAC, COMESA and ECCAS represented respectively only 7.4 per cent, 7.2 per cent and 0.65 per cent of Burundian GDP whereas exports from Burundi to EAC, COMESA and ECCAS amounted to 0.53 per cent, 0.82 per cent and 0.43 per cent of GDP respectively.

**Productive integration:** Burundi has a low level of integration into regional value chains. Its trade bears little relation to that of its partners. The trade complementarity index compiled by the United Nations Conference on Trade and Development (UNCTAD) stands at 0.15 for Burundi in relation to the rest of EAC between 2010 and 2013, which suggests a poor correlation between Burundian exports and the import structures of the EAC countries.

**Infrastructure:** The country was ranked first among the members of EAC in the infrastructure development index of the African Development Bank between 2010 and 2012 owing to its dependence on regional infrastructures. For example, 85 per cent of international flights to and from Burundi are intra-EAC and COMESA. Similarly, intra-African cellular roaming costs are lower.

**Financial integration and convergence of macroeconomic policies:** The inflation rate of Burundi is higher than that of the other member countries of EAC, COMESA and ECCAS.

Overall, Burundi tends to perform poorly, except in the areas of infrastructure and productive integration. In particular, Burundi could try to stimulate intraregional trade in goods and services.

\* A continent-wide ranking, in which all African countries from all regional economic communities will be compared with one another, is currently under development for the Africa regional integration index and will be added to subsequent updates of the ECA country profiles.

# 3

## Economic performance

### 3.1 Economic growth

The Burundian economy is one of the smallest in the world with GDP valued at about 4,528 billion BIF in 2015. Compared with 2014, GDP declined by 3.9 per cent in 2015 according to the Bank of Burundi. In 2016, recovery seems slow and the growth rate is estimated at 0.7 per cent by the Ministry of Planning (Ministry of Good Governance and Planning, 2016).<sup>7</sup> In the decade before the political crisis of 2015, the growth rate had stood at an average of 4.5 per cent denoting a slow-growing economy, 6.5 per cent lower than the average of the other countries of EAC. Historically reliant on agriculture, which contributes an average of 36 per cent to GDP while employing 87 per cent of the workforce<sup>8</sup>, the Burundian economy is dependent on foreign aid<sup>9</sup> and in addition is extremely susceptible to fluctuations in the prices of raw materials and foodstuffs such as oil, coffee and tea (ISTEEBU, 2016a)<sup>10</sup>.

The crisis of 2015 affected the economic sectors in different ways. The construction sector suffered the greatest impact plunging 35 per cent, attributable principally to the suspension of foreign aid, the traditional driver of the sector. The secondary sector as a whole recorded a drop of 14 per cent, after growth of 7.4 per cent in 2014, driven by the mining sector and the manufacturing industries. The primary sector was also affected, but to a lesser degree, with a decline of about 3.6 per cent<sup>11</sup>, mainly because of a fall in food crop production. The tertiary sector recorded poor growth of 2 per cent, concealing large disparities between the sectors particularly affected by the crisis such as trade or transport, whereas the communications sector continued to make rapid strides (figure 7). According to ISTEEBU, production activities as a whole declined by 8.5 per cent between 2014 and 2015 (ISTEEBU, 2016a)<sup>12</sup>.

<sup>7</sup> The forecasts were revised downwards. In April 2016, the Ministry of Finance announced a growth rate of 3.5% (Burundi Eco, 2016). The World Bank estimate is 2.9% for 2016 (World Bank, 2016b)

<sup>8</sup> The Burundian workforce was estimated at 37.3% of the total population in 2013 and 87.11% of this labour force worked in agriculture.

<sup>9</sup> In 2013, grants amounted to 33% of total state revenue (BRB, 2016a).

<sup>10</sup> Petroleum and fuel products constitute one of the main imported products, covering more than 25% of total imports. Coffee and tea are the main export crops, accounting for more than 60% of total Burundian exports.

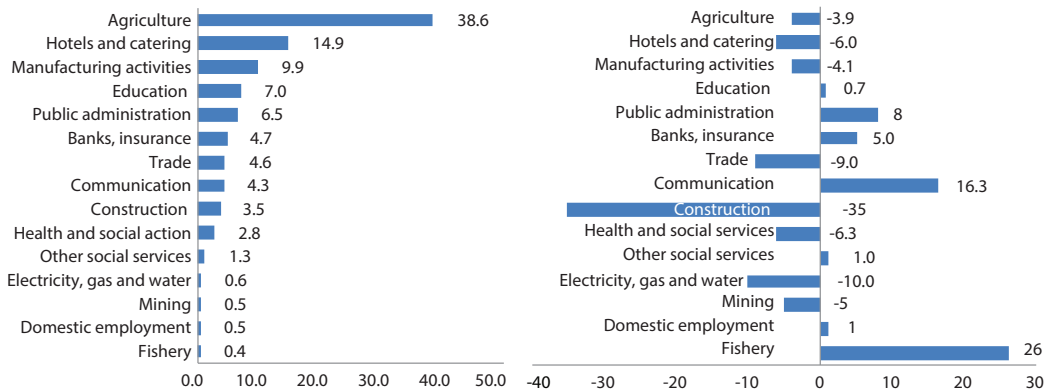
<sup>11</sup> The agricultural sector declined by 3.9% while the fisheries sector experienced exceptional growth of 26%. It should be noted that the evolution of the sector fluctuated considerably in recent years.

<sup>12</sup> Other analyses, such as that conducted by the World Bank during consultations conducted in Geneva in November 2016, suggested instead that the crisis principally affected the tertiary and secondary sectors, while the primary sector, poorly monetarized, was less affected.

Analysing the contributions to the growth of GDP, it is clear that the recession was mainly caused by the sharp decrease in investments (-42 per cent), the fall in exports (-13 per cent) and imports (-8 per cent)<sup>13</sup>. Demand seems to have weathered the crisis better, with an increase in the order of 5 per cent in constant prices for household consumption and 3 per cent for Government consumption.

The collapse of world prices of petroleum products limited the impact of the crisis on the Burundian economy. Nevertheless, per capita GDP growth was affected by the recession. According to the World Bank (WB, 2016b), at \$276 per capita, the GDP of Burundi in 2015 was the lowest in the world. In 2014, it was steady at \$285, which showed a gradual increase over time, from 2003. In the wake of the crisis of the 1990s, it had plunged to its lowest level of \$106 per inhabitant.

**Figure 7: Sectoral contribution and real growth rate (2015, percentage)**



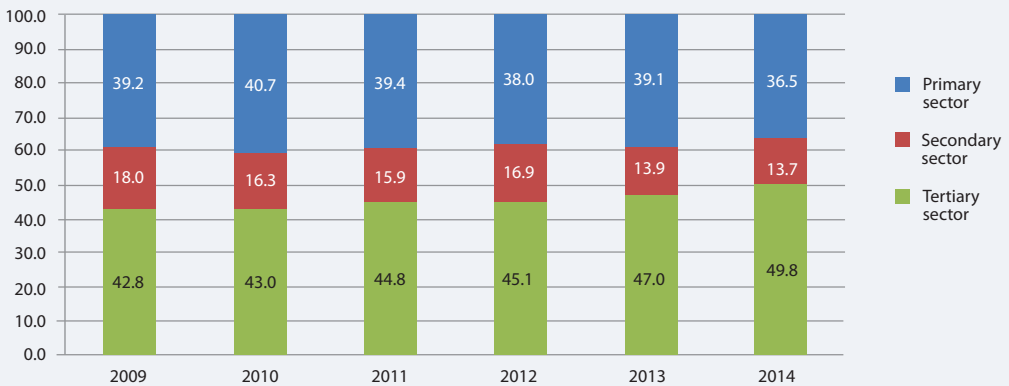
Source: BRB (2015a); ISTEERU (2016b) and Ministry of good governance and planning (2016).

<sup>13</sup> Evolution in current prices, data supplied by the Central Bank of Burundi for 2015 and corroborated by our calculations.

**Box 3: A long-term view of structural transformation in Burundi**

An analysis of the pace of structural transformation in Burundi reveals a slow change in sectoral distribution. The primary sector gradually reduced its contribution to GDP, with low average annual growth of about 2.3 per cent between 2010 and 2014 (BRB, 2015a). Export crops did relatively well (notwithstanding wide annual fluctuations). However, staple food crops recorded low, or even negative, growth (ISTEEBU, 2015b). It is difficult to determine the proportion of the working population involved in the primary sector. The official statistics vary between 14 per cent (ISTEEBU, 2008) and 87 per cent (ISTEEBU, 2015b). Based on the latter, and consistent with the rural/urban divide and data provided the World Bank, the proportion of the workforce involved in the agricultural sector declined from 94 per cent in 2002 to 87 per cent in 2013. In the same period, the proportion of the population working in the services sector rose from 4.4 per cent to 6.6 per cent; the industrial sector remained the same. At the same time, the occupational transition of the workforce was not supported by productivity gains in the agricultural sector, revealing the low degree of structural transformation in the country.

**Figure A: Sectoral structure of GDP between 2009 and 2014 (constant prices 2005)**



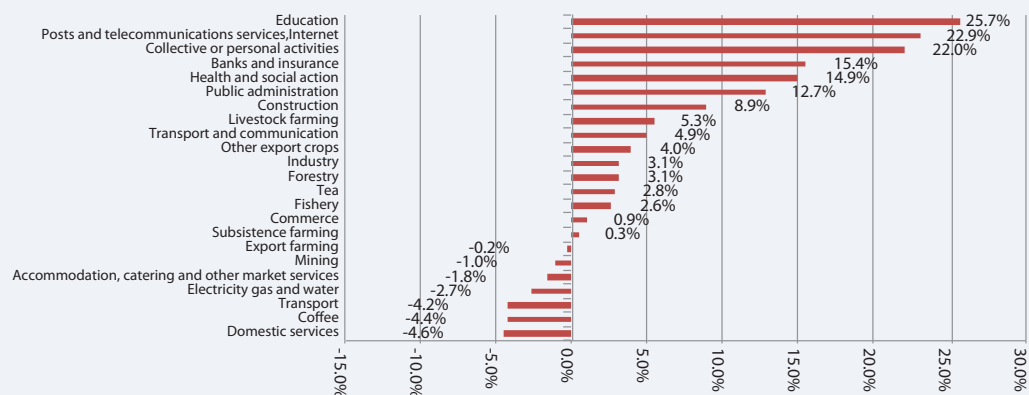
Source: BRB (2015a); ISTEEBU (2016b).

The secondary sector\* showed few signs of growth (3.3 per cent between 2010 and 2014) and its share in the economy tended to decrease, accounting for less than 14 per cent of GDP in 2014. According to official statistics, the sector employed only 2 per cent of the working population. The tertiary sector\*\* was responsible for a growing share in the economy, driven by the buoyancy of the public sectors, banks and insurance. For a decade, it was the largest contributor to GDP in Burundi, with growth of 6.3 per cent on average between 2010 and 2014, and accounting for almost 50 per cent of GDP; on the other hand, it employed only 6 per cent of the working population. The construction sector experienced respectable growth, which has been compromised by the crisis of 2015. The tourism sector experienced strong growth in the period between 2005 and 2012 with the development of hotel facilities which almost quadrupled the accommodation capacity of the country, but this growth slowed down with effect from 2012.\*\*\*

\* The secondary sector mainly comprises the production of the national brewery (50% of production) and the energy sector.

\*\* The tertiary sector is mainly a service sector consisting of commerce and other market and administrative services.

\*\*\* This sector includes accommodation and catering and market services.

**Figure B: Annual growth broken down by sector between 2005 and 2014**

Source: Calculated by EAC with data from ISTEEDU (2015).

## 3.2 Budget policy

Public finances began to deteriorate in 2014 and the situation worsened in 2015 with an increase in the budget deficit of 44 per cent in one year. This imbalance may be attributed to a decrease in total resources in the order of 16 per cent in 2015, whereas expenditure decreased by only 6 per cent over the same period. These resources represented about 16.4 per cent of GDP (BRB, 2016)<sup>14</sup> in 2015 compared with 19.6 per cent of GDP in 2014.

**Table 1: Budget accounts (in millions of Burundi francs and as a percentage of PIB)**

	2011	2012	2013	2014	2015		2011	2012	2013	2014	2015
Total revenue and grants	24.0	20.3	22.0	19.6	16.4	Total revenue and grants	677 521	681 708	836 964	877 041	742 055
Taxes	15.6	14.7	13.8	12.8	12.0	Taxes	440 974	491 879	524 540	572 207	543 666
Non-fiscal revenue	1.1	1.0	1.0	2.0	1.2	Non-fiscal revenue	32 184	34 880	37 763	91 005	56 386
Grants	7.2	4.6	7.2	4.8	3.1	Grants	204 363	154 950	274 662	213 828	142 003
Total expenditure and net lending	27.3	24.6	25.0	23.6	22.1	Total expenditure and net loans	768 962	825 483	953 026	1 059 286	998 567
Recurrent expenditure	19.7	17.6	18.1	16.1	17.8	Current expenditure	554 057	591 980	689 728	721 598	805 598
Including: wages & salaries	9.7	8.4	7.8	7.0	7.1	Including: remunerations and salaries s	273,008	282,162	295,660	314,387	322,820
Including: interest payments	1.2	0.9	0.8	0.8	0.9	Including: interest payments	32 459	30 409	29 738	35 766	40 632
Development expenditure	7.6	7.0	6.9	7.5	4.3	Equipment expenditure	214 905	233 502	263 298	337 688	192 969
Fiscal balance	-3.2	-4.3	-3.0	-4.1	-5.7	Budget balance	-91 441	-143 775	-116 062	-182 246	-256 512

Source: BRB (2016a) and updated.

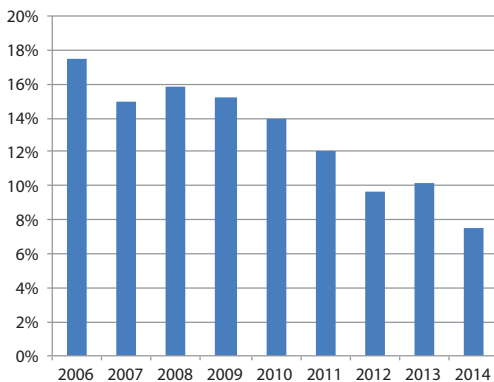
<sup>14</sup> According to the corrected data supplied to ECA by the Bank of the Republic of Burundi (BRB).

Overall, the mobilization of domestic resources was low, due to the slowdown in economic activity associated with the sociopolitical crisis of 2015. State revenue had already decreased in 2014 because of the fall in foreign aid in a tense pre-electoral situation. The trend which began in 2014 was confirmed in 2015 and 2016 (Council of the European Union, 2016). Between 2014 and 2015, external budget support grants plunged by almost 34 per cent and capital grants by about 50 per cent.<sup>15</sup> An analysis of official development aid payments (ODA) to Burundi during the last decade shows that they were constantly declining in relation to GDP (figure 8). As for the distribution of aid, the European Union, the World Bank assistance fund and Belgium were the main donors (figure 9).

Notwithstanding major structural reform of the budget policy, the weakness of the tax administration’s institutional capacities severely affected the mobilization of domestic resources and the rate of fiscal pressure continued to decrease since 2011 to 12 per cent. Compared with 2014, tax revenue decreased by only 5 per cent.

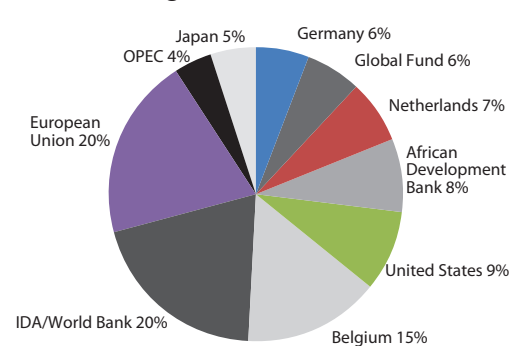
Total expenditure (including net loans) decreased by 6 per cent in 2015 compared with 2014 and accounted for 22 per cent of GDP. The decline related mainly to investment spending, (by 43 per cent compared with 2014) whereas current expenditure continued to increase (12 per cent). The suspension of direct budget support which financed investment spending explains this drastic reduction in investments which was confirmed at the beginning of 2016. Whereas

**Figure 8:** ODA payments as a percentage of gross domestic product, in United States dollars, 2006-2014



Source: OECD – DAC data.

**Figure 9:** Distribution of gross overseas development assistance in United States dollars, average 2013-2014



Source: OECD – DAC data.

Notes: OPEC, Organization of the Petroleum Developing Countries; IDA, International Development Association.

<sup>15</sup> The national data underestimate the contribution of external resources, particularly grants. According to the data provided by the Central Bank, grants amounted to only 19% of the resources of the State in 2015 compared with 33% in 2013. Other reports estimated that foreign aid before the crisis represented 50% of state resources (see website of the European Union delegation in Burundi or African Development Bank, (2011). Whatever the situation, the suspension of foreign assistance had a major impact on the Government’s budget in 2015 and 2016.

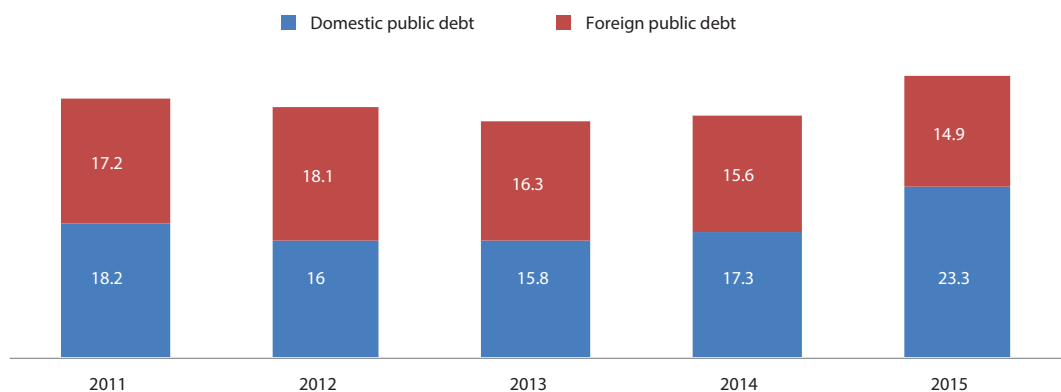


investment spending stood at an average of 16 billion Burundi francs (BIF) (\$9.4 million) per month in 2015, for the first quarter of 2016 it amounted to only 8 billion BIF.

This situation affected the overall budget balance, with the deficit rising by 41 per cent in 2015, from 4.1 per cent of GDP in 2014 to 5.7 per cent in 2015. The increase in the budget deficit seemed to slow down in the first quarter of 2016, mainly because of the sharp decrease in capital spending. To finance the growing budget deficit, Burundi had to rely heavily on domestic debt. Domestic public debt which accounted for 23.3 per cent of GDP in 2015 was mainly contracted with the Bank of the Republic of Burundi (BRB) in the form of Treasury bills and bonds. As a result, the level of domestic public debt increased by 45 per cent between 2014 and 2015 (figure 10), making things difficult for the national financial institutions, the main lenders, and putting the country in an unsustainable situation in the long term.

With respect to external debt, the levels were actually quite low in relation to international and regional standards. The debt to GDP ratio was 14.9 per cent in 2015 compared with 29.3 per cent in the United Republic of Tanzania or 44.6 per cent in Kenya. Nevertheless, in a recent analysis of the viability of the country's debt (IMF, 2015), IMF experts stated that the country continued to face a high risk of debt distress with a ratio of servicing foreign debt/exports likely to cross the threshold of viability. In this context, IMF recommended that Burundi should limit its debt, emphasizing that loans were to continue to be concessionary, in view of its narrow export base. Paradoxically, although foreign public debt slightly decreased in 2015 in relation to 2014, standing at \$420 million in 2014, its viability deteriorated still further because of the fall in exports and foreign exchange, because the ratio of debt service to exports rose from 2.5 per cent in 2011 to 5.8 per cent in 2015.

**Figure 10: Evolution of public debt in Burundi (percentage of GDP)**



**Source:** Bank of the Republic of Burundi (2016).

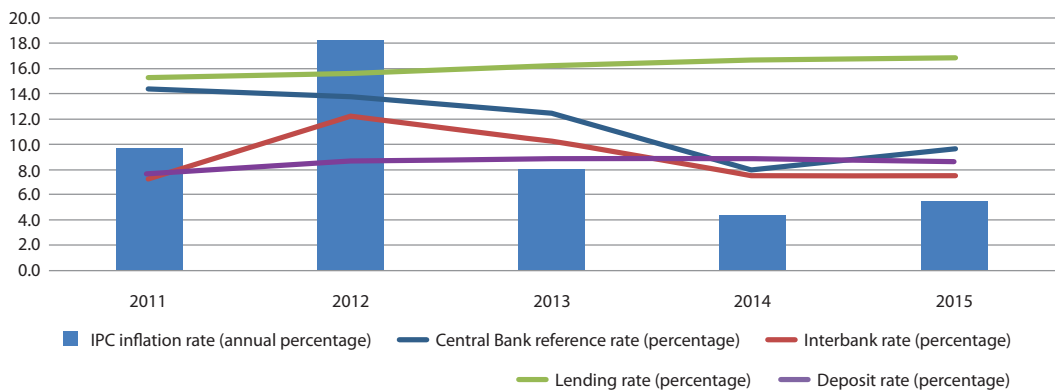
### 3.3 Monetary policy

Notwithstanding the impact of the crisis on the Burundian economy, the inflation rate remained relatively controlled. According to the Bank of the Republic of Burundi, the global consumer price index posted an increase of 5.6 per cent in 2015 thanks to the fact that the restrictive monetary policy which had enabled BRB to bring the rate of inflation down from 24.5 per cent in 2008 to 4.4 per cent in 2014 had been kept in place. It should be noted, however, that food prices experienced a much more significant increase in that period, which had an impact on the situation of households. The increase in food prices on a year-on-year basis was evaluated at 11 per cent for the month of February 2016 (ISTEEBU, 2016a).

The rigorous monetary policy of the Bank of the Republic of Burundi led to a decline in money supply of about 8.6 per cent in 2015 and a rise in key rates during the same period, with the average rate of the marginal lending facility peaking at 30.2 per cent in May 2015, at the height of the crisis. Interest rates remained quite high, with an average borrowing rate of 16.9 per cent as an annual average of 2015, making access to credit one of the main problems in Burundi, ranked 174<sup>th</sup> out of 184 with respect to access to credit in the World Bank index Doing Business.

Officially, the Burundian franc depreciated by only 1.6 per cent in relation to the US dollar in 2015, whereas it had appreciated by 0.5 per cent over the preceding period and the State had followed its interventionist policy to stabilize the local currency<sup>16</sup> and to facilitate obtaining foreign currency for strategic imports (BRB, 2015b). The parallel market, however, reacted to the political crisis, since the dollar was trading at more than 2,300 BIF in July 2016, whereas the official rate was 1,558.1. As a consequence of these tensions in the exchange market, the

**Figure 11: Inflation and interest rates (annual, as a percentage)**



**Source:** BRB (2015a; 2016a; 2016b).

<sup>16</sup> Through the establishment of an interbank foreign currency market in April 2013, in which only the commercial banks and not the foreign exchange bureaus are authorized to purchase foreign exchange.

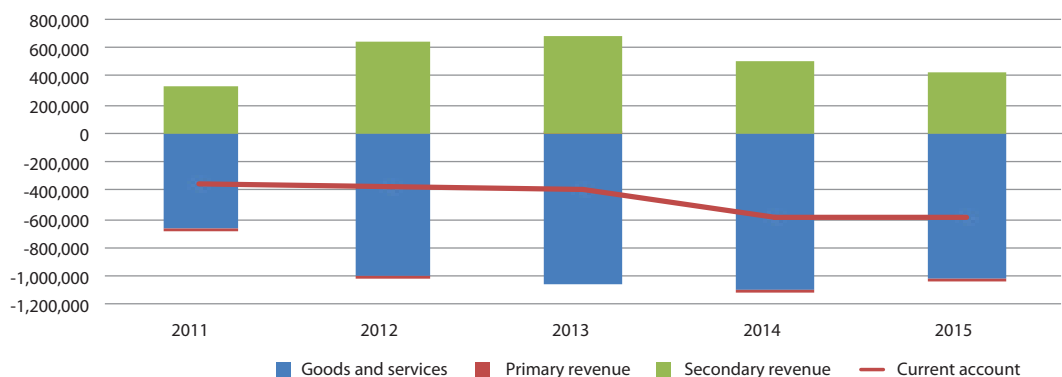
foreign exchange reserves decreased by about 41 per cent in 2015, representing only 2.3 months of imports for the following year compared with 4 months in 2014.

### 3.4 Current operations account

The trade deficit of Burundi is large for such a small economy. After Rwanda, Burundi sustains the largest current account deficit in the subregion, resulting in a permanent financing problem. Although it decreased slightly in 2015, the trade deficit still accounted for 22 per cent of GDP and 13 per cent of GDP for the current deficit (figure 12).

This modest improvement was due to a decrease in the volume of trade in 2015 of 13 per cent for exports of goods and services and 9 per cent for imports. The imbalance of the trade balance can be attributed first to a decline in the value of exports (ISTEEBU, 2016c). Because 60 per cent of the country's exports consist of coffee and tea, they are dependent on the vagaries of production and price fluctuations on the world market. In the medium term, the share of primary products in exports shows a tendency to decline in favour of manufactured goods which accounted for 31 per cent of exports in 2015 compared with only 8 per cent in 2011. The main exported products besides coffee and tea are beer, soap and wheat flour<sup>17</sup> (figure 13). The main customer of Burundi is the Democratic Republic of Congo: sales to that country represented 19 per cent of exports in 2014 and 24 per cent in 2015. In general terms, however, Asia has become the main customer of Burundi (23 per cent of exports, see figures 3 and 4), ranking higher than the European Union (8 per cent) and Switzerland (20 per cent). The EAC countries represent 20 per cent of Burundian sales.

**Figure 12: Current operations accounts in millions of Burundi francs**



**Source:** BRB (2015a) and update in 2016.

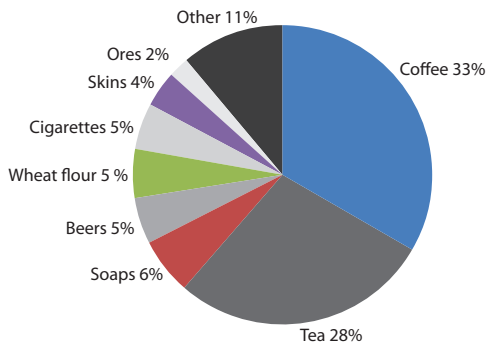
<sup>17</sup> It should be noted, however, that according to the national bureau of statistics, (ISTEEBU, 2016c) gold accounted for 11 per cent of total exports in 2015, with ore exports valued at almost 22. Billion BIF. Gold export earnings do not appear specifically in all other official documents. .

Second, the value of imports increased steadily from 2011 to 2014. In 2015, imports of goods and services experienced a decline of 9 per cent in relation to 2014. The chief imports include petroleum products (25 per cent), construction materials (showing a significant drop in 2015, an expression of the downturn in the activity of the sector), electrical appliances and mechanical equipment (see figure 14). The majority of Burundian imports originate from Asia (42 per cent), principally China and India, the EAC countries (19 per cent) and the European Union (22 per cent).

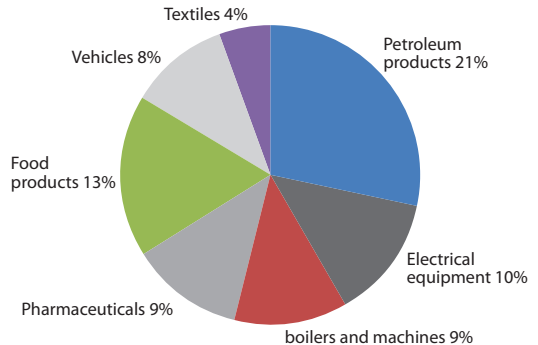
The industrial and commercial strategy of Burundi was devised in 2011, emphasizing enhanced competitiveness and an improved business environment. To achieve this, it engaged in an ambitious reform programme: establishment of an investment agency; reform of the Chamber of Commerce and Industry; establishment of a one-stop shop for business creation or customs procedures. These ambitious reforms led to significant advances, illustrated by the World Bank ranking of ease of doing business, in which Burundi climbed from 109<sup>th</sup> place in 2007 for business creation to eighteenth place in the world in the 2017 ranking. Nevertheless, Burundi still occupies 157<sup>th</sup> place in the global ranking behind Rwanda (fifty-sixth) but ahead of the Democratic Republic of the Congo (184<sup>th</sup>). The main problems continue to be access to credit and electricity supply.

In fact, Burundi identified three priority sectors for the development of its trade strategy: agribusiness (justified by the size of the agricultural sector), tourism (Burundi, which has many tourist attractions, is keen to benefit from the regional stimulus) and the mining sector. For the latter, the establishment of a new mining code in 2013 as well as a mining policy by the Ministry of Energy and Mines in 2014 was designed to develop the potential offered by mineral resources, particularly gold, nickel and cassiterite, in an effort to contribute to the diversification of the economy and exports. The main lines of the strategy proposed to enhance the regulation of the sector in particular by combating illegal exploitations; they also aimed to attract investors by developing hydroelectric energy facilities and means of transport

**Figure 13: Structure of exports, 2015, as a percentage**



**Figure 14: Structure of imports, 2015, as a percentage**



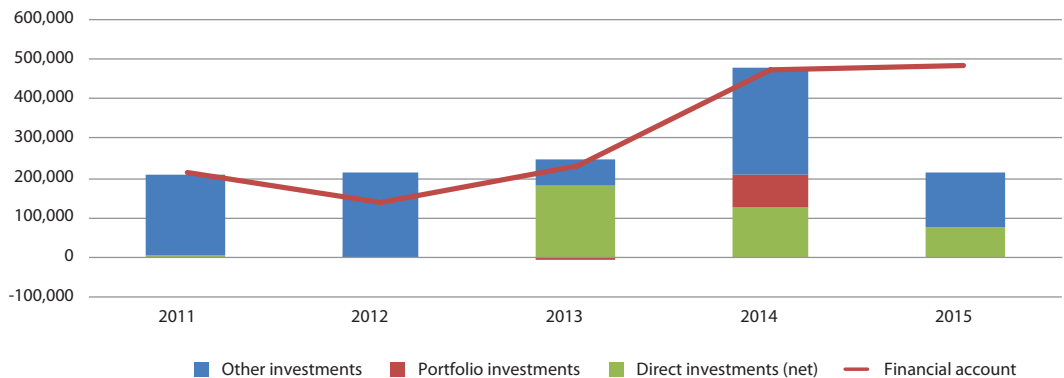
to enable production and exportation on a larger scale. For this purpose, the Burundian Government announced at the beginning of 2016 that the multinational BMM would launch its operation of a nickel mine at Musongati.

### 3.5 Capital account

In 2015, the capital account declined with a surplus balance of 87 billion BIF compared with 126.5 billion BIF in 2014. The decrease in revenue was related to the serious decline in capital transfers to the government agencies (project grants) and a substantial decrease in foreign investments, which plunged from 126 billion BIF in 2014 to 78 billion BIF in 2015<sup>18</sup>.

It would be interesting to conduct an analysis and assessment survey of the rate of completion of investments. Although Burundi obtained encouraging results in the Doing Business rankings, climbing from 177<sup>th</sup> place in 2011 to 155<sup>th</sup> in 2016, it fell 157<sup>th</sup> place at the beginning of 2017.

**Figure 15: Financial operations account (in millions of Burundi francs)**



**Source:** ISTEERU (2016b) and BRB (2016).

<sup>18</sup> According to data supplied by UNCTAD (2016), foreign direct investments plunged from \$47 million in 2014 to \$7 million in 2015 pursuant to the sociopolitical crisis.

# 4

## Social development

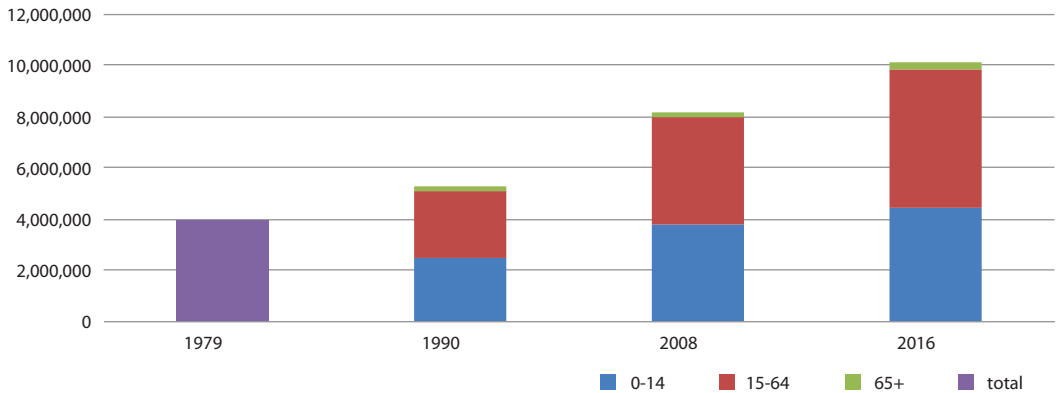
### 4.1. Demography

Demographic pressure is one of the main problems confronting Burundi. With a population of about 10.1 million inhabitants in 2016 (ISTEEBU, 2015b) and a density of 379 inhabitants per km<sup>19</sup>, Burundi is one of the most densely populated countries in Africa, just behind Mauritius and Rwanda. This pressure takes the form notably of problems of access to land, to farmland – given that it has a rural population of 87 per cent – and to social services. The increased population in the rural areas in an already very densely populated country is leading to increased pressure on the land, while the average size of family farms continues to decrease and creates a potential source of conflict in the rural areas, together with a decline in agricultural productivity. Indeed, this demographic pressure continues to increase because of a population growth rate that is among the highest in the world, 3 per cent according to the forecasts issued by ISTEEBU (2013), and a fertility rate of more than six children per woman<sup>20</sup>. In fact, the population of Burundi is very young: 44 per cent was under 15 years of age in 2013; its particularly high dependency rate of 90 per cent (World Bank, 2016b) is heightening the pressure on economic growth and the national budget.

The population, which had already doubled between 1979 and 2008 (Figure 16), is likely to double again over the next 30 years if the trend is not reversed (United Nations Population Fund (UNFPA), 2016a). In reality, regardless of the evolution of the demographic growth rate, the population is likely to double by 2050 because of the youth of the current population (Guengant, 2016). To reverse the trend, in 2011 the Government launched a declaration defining a national demographic policy (Ministry of Planning, 2011), whose main objective was to slow down demographic growth by reducing the fertility level to 3 children per woman by 2025. The goal of reducing the demographic growth rate to 2 per cent was even included in “Vision 2025” of the Republic of Burundi and forms its fifth pillar. The results of this policy are still difficult to measure. During an evaluation workshop in April 2016, the second Vice President, Joseph Butore, demonstrated that the persistence of strong demographic pressure severely compromised access to social services in the country. According to UNFPA (2016a) very significant progress was made in family planning with an increase in the contraceptive prevalence rate from 2.7 per

<sup>19</sup> 435 inhabitants per km<sup>2</sup> according to the World Bank (2016b)

<sup>20</sup> 6.4 children per woman in 2010 (ISTEEBU, 2012)

**Figure 16: Population of Burundi, in millions, by age group**

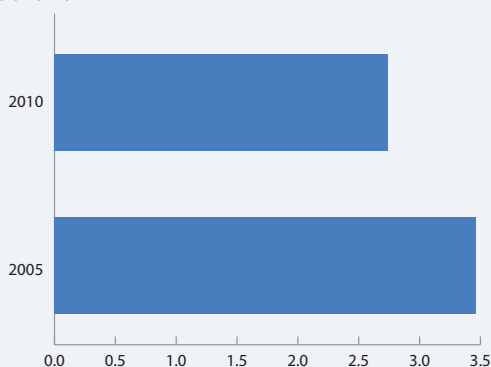
Source: ISTEERU (2012); (2013).

cent in 2000 to 36.3 in 2015<sup>21</sup>. In another document, (UNFPA, 2016b), UNFPA also showed, however, that the number of consultations in reproductive health and family planning decreased respectively by 25 per cent and 40 per cent over the first five months of 2015, mainly because of the prevailing insecurity, which pointed to a regression in the successes achieved up to that point.

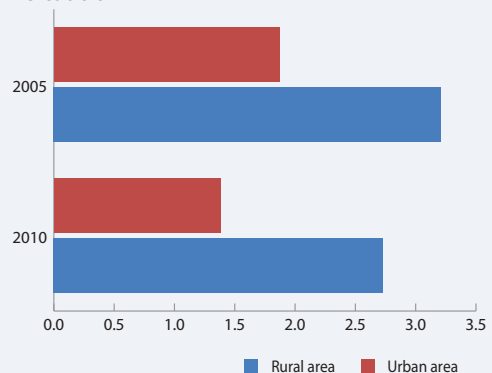
#### Box 4: African Social Development Index

The African Social Development Index showed an upward trend between 2005 and 2010, as human exclusion declined by 21 per cent, although the overall figure remained high (figure A).

**Figure A: African Social Development Index in Burundi**



**Figure B: Human exclusion by geographical situation**

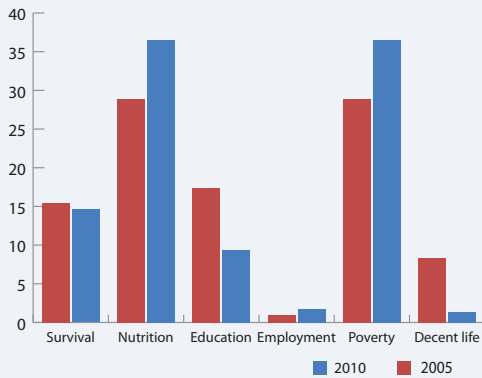


Source: Figures calculated using national data

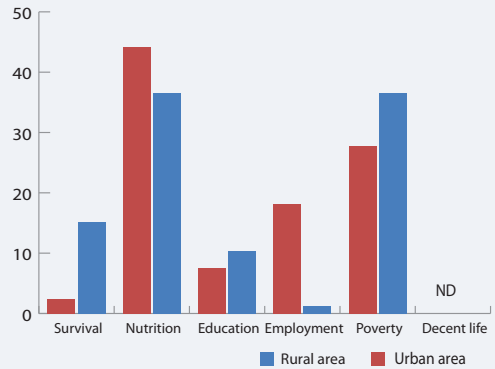
<sup>21</sup> Including traditional contraception methods, the contraceptive prevalence rate was 42% in 2015, thereby reducing the fertility index to only 4.6 children per woman in 2015 according to some estimates (Guengant, 2016). In fact, these estimates forecast that Burundi could very well achieve a fertility rate of less than two children per woman by 2050.

The decline in exclusion was almost the same for men and women during the period under consideration, which significantly differentiates Burundi from the other countries in the subregion. On the other hand, the divide between urban and rural dwellers continues to be a major problem in the country (figure B). According to the African social development index, human exclusion in the rural areas fell by 14 per cent between 2005 and 2010, compared with 27 per cent in urban areas over the same period. The specific areas of vulnerability of Burundi in terms of extreme weather variations and agricultural production exacerbated exclusion and persistent poverty of the rural population. Furthermore, this trend could be a sign of the failure to ensure the necessary transfer of tax revenue to the remote regions. From 2005 to 2010, the relative influence of nutrition and poverty on exclusion increased (figure C). The impact of health policies, particularly with respect to the early phases of life, were not as successful as anticipated. It is possible that this was the result of the limited health insurance system coverage. In addition, exclusion related to education clearly showed the gender differences (6.3 per cent for men and 12.3 per cent for women). Finally, the advantages enjoyed by urban areas in terms of education and health care show that the spatial variations of public services continue to be an important factor in human exclusion in Burundi (Figure D). On the other hand, employment is an exclusion factor that mainly affects the urban areas, reflecting the scale of unemployment of young people in the urban environment.

**Figure C: Human exclusion factors**



**Figure D: Human exclusion factors depending on geographical situation**



## 4.2. Poverty and employment

As a result of its impact on the growth and supply of social services, the sociopolitical crisis which began in 2015 could affect the level of poverty in a country regarded as one of the poorest in the world. Per capita GDP in current dollars was estimated in 2015 at \$276 compared with \$285 in 2014 (World Bank, 2016b), representing a fall of 3.5 per cent. In the medium term, instability could certainly affect the successes achieved in the last decade in poverty reduction, although such achievements were somewhat tenuous. An analysis published in November 2016 (United Nations Office for the Coordination of Humanitarian Affairs, 2016b) shows, nevertheless, that the number of persons needing humanitarian assistance climbed from 1.1 million in February 2016 to 3 million in November 2016, under the combined impact of natural disasters and the ongoing political crisis.



According to the survey on household living conditions (ISTEEBU, 2015a) conducted in 2014, the monetary poverty rate stood at 64.6 per cent of the total population of Burundi in 2014, compared with 67.1 per cent in 2006, and an overall decline of 2.5 per cent which masked serious regional disparities, with the urban areas recording a rate of only 34 per cent (OECD, 2016) whereas the rural areas were more greatly affected.

Consideration of the various aspects of poverty suggests even weaker progress. In its report on sustainable human development (ISTEEBU, 2015b), ISTEEBU experts showed that the human poverty index, rising from 33 per cent in 1990 to 45.2 per cent in 2003, the year in which the civil war in Burundi ended, still stood at 47 per cent in 2013<sup>22</sup>. With a human development index of 0.400, these figures relegated Burundi to 184<sup>th</sup> place out of 188 in the global ranking of the Human Development Report, although it achieved slow but steady progress over the last 30 years (UNDP, 2016b). The achievements of recent years were driven by two four-year poverty reduction plans, the strategic framework for poverty reduction (SFPR), the most recent of which, completed at the end of 2015, focused government budget planning on investments targeting the most impoverished populations in the various social sectors. According to OECD, this pro-poor policy implemented over the last decade not only led to modest poverty reduction but also helped to reduce inequality and the gaps in relation to the poverty threshold (Tokindang and Gbetnkom, 2016).

Difficulties still persist in analysing the employment issue because a considerable proportion of the population is employed in the informal sector (ISTEBU 2008). According to the final report on the national survey, the unified questionnaire on basic indicators and well-being (QUIBB) conducted in 2006 (Ministry of Planning, 2006), only 2 per cent of the active population was unemployed in Burundi. The method of calculation adopted by the QUIBB survey used the concept of work in the broad sense of an economic activity, whether formal or informal. In this report, the global activity rate of persons aged between 5 and 70 was 56.2 per cent and over 90 per cent for the 35 to 59 age group. Looking at the distribution of labour, it appears that more than 87 per cent worked in the primary sector, a rate that was even higher for women.

Other statistics included by UNDP, OECD and the African Development Bank in their annual report showed a much higher unemployment rate, particularly among young people under 30 where it reached 50 per cent<sup>23</sup>, also pointing out the inefficiency of the labour market in terms of salary and productivity, professional management and the capacity to attract skills.

<sup>22</sup> The human poverty indicator takes into account access to water, health care, life expectancy, literacy level and food insecurity.

<sup>23</sup> The International Labour Organization (ILO) ranks Burundi among the 15 countries with the highest unemployment rate in the world.

### 4.3. Health

The health sector is a priority area for the Government and its foreign partners and has enjoyed substantial resources in recent years (Loannou and others, 2009). In a decade, the proportion of public spending allocated to health posted a record growth rate of about 181 per cent to stand at 1.8 per cent of GDP in 2013.

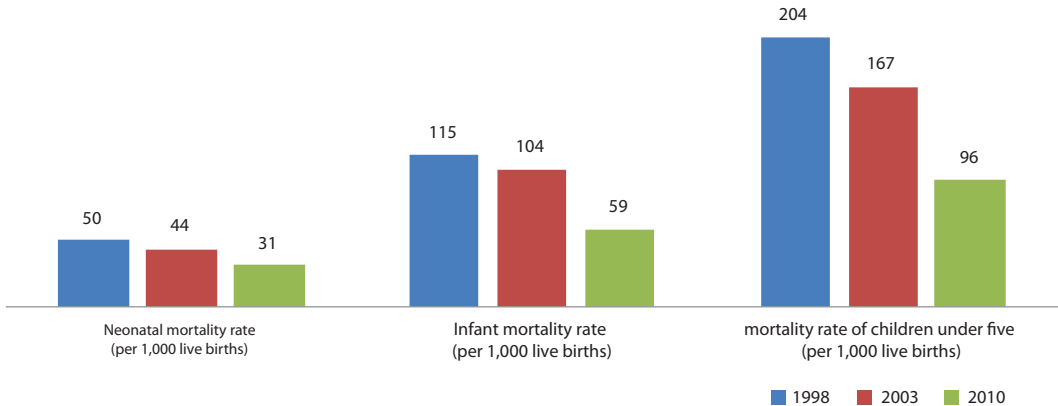
The first aim of the policies put in place in the two national health development plans (2006 to 2010 and 2011 to 2015) was to establish free health services targeting children under five and pregnancy and delivery services, and their second goal was to enhance the management of the health system through a policy of decentralization, strengthening human resources and financing by performance-based contractualization (Ministry of Health, 2012 and 2016). These measures allowed notable progress, with an appreciable reduction in the maternal and child mortality rate over the last decade (figure 17), even though there were still insufficient facilities and health professionals tended to be clustered in the urban areas; in fact, 50 per cent of nurses and 80 per cent of doctors practiced in Bujumbura (Kanama and others, 2011). The new national health policy for 2016-2025 (Republic of Burundi, 2016) is in line with the previous policies designed to enhance the way in which the health system works. The establishment of universal health cover, based in the community health centres, is one of the priority objectives of this approach.

Notwithstanding these achievements, the maternal mortality rate remains alarmingly high, with almost 500 deaths per 100,000 live births according to the most recent demographic and health survey (ISTEEBU, 2012), whereas it was estimated at 800 per 100,000 in 1998. According to UNFPA, the main causes of death are haemorrhages and infections, mainly attributable to the lack of equipment and qualified health professionals in emergency obstetric and neonatal services, which are in any case far too few for the caesarean sections and transfusions required. Although the proportion of deliveries conducted by qualified health professionals has significantly increased, it still stands at only 60 per cent; the reduction in the maternal mortality rate therefore requires reinforcement of the emergency obstetric and neonatal services, both in number and in quality of care, as well as an improvement in the referral of expectant mothers to these hospitals.

In addition, the recent survey conducted by UNDP shows that the financing of the support programmes in the health sector decreased by 87 per cent in 2015, which could have an impact in the medium term on the provision of health care, particularly for pregnant women and children under five who benefit from free health care (United Nations Office for the Coordination of Humanitarian Affairs, 2016a)<sup>24</sup>.

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<sup>24</sup> An analysis conducted by the United Nations agencies in Burundi (during preparatory consultations held in Geneva in November 2016) showed that 25% of maternal mortality cases concerned women under 25 and that this rate had doubled between 2014 and 2015.

**Figure 17: Neonatal, infant and child mortality (per 1,000 live births)**

Source: ISTEERU (2012).\*

\* Other unofficial data suggest that the mortality rate of children under five is currently 83 per 1,000 live births.

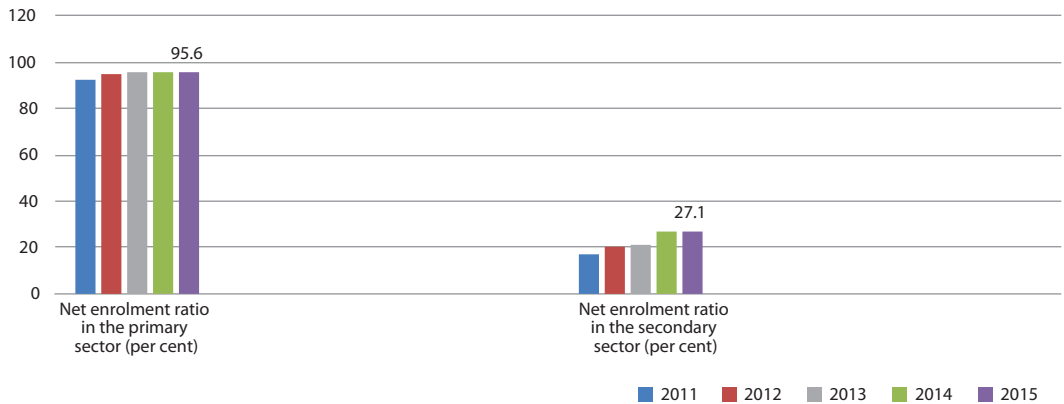
Moreover, the level of food insecurity remains a matter for concern. According to the World Food Programme (WFP), 46 per cent of the population of Burundi suffers from food insecurity, a situation which affects the rural areas more (48 per cent of households affected) than Bujumbura (9 per cent of households). The World Food Programme estimates that between 2014 and 2016, food insecurity increased by 11 per cent, mainly for structural reasons (lack of access to land, decreased soil fertility, high population density), but also because of aggravating factors such as the current sociopolitical crisis and the increase in food prices (WFP, 2016).

The prevalence of HIV and AIDS is evaluated at 1.4 per cent among the population aged between 15 and 49, with a drop of almost 100 per cent in the number of deaths of AIDS orphans, reduced to 6,000 cases in 2012. The prevention rate for pregnant women benefiting from the prevention of mother to child transmission services (PMTCT) also experienced a notable upswing in less than three years and in 2013 covered almost 57.9 per cent of pregnant women<sup>25</sup>.

#### 4.4. Education

One of the major achievements of the decade was the establishment of free primary education in 2005, supported by massive investment in educational facilities. This policy pushed the gross enrolment ratio up from 75.5 per cent in 2003 to more than 130 per cent in 2011, creating a “catch up” effect for older children which subsequently diminished, with the gross enrolment ratio falling back to 107 per cent in 2014. In primary education, girls made up more than half the number of pupils, which was the case until the end of 2015. These disparities between girls and boys appeared in the secondary sector, where the drop-out rate of girls was higher than that of

<sup>25</sup> Nevertheless, recent statistics (preparatory consultations, Geneva, 2016), show that the percentage of children aged less than two months born to HIV-positive mothers who have had a serological test fell from 18% in 2013 to 2% in 2015, which illustrates the difficulties besetting the health sector.

**Figure 18: Net enrolment ratio in the primary and secondary sectors**

**Source:** EAC (2016).

boys, largely because of early marriage and pregnancy. UNICEF estimates that 19.6 per cent of boys and 70 per cent of girls actively attend secondary school (UNICEF, 2016).

In the same way as the enrolment ratio, the rate of completion of primary education is higher than the average of the countries of sub-Saharan Africa, demonstrating the relative effectiveness of the education system, but many problems persist. In the first place, the pre-primary enrolment ratio (8 per cent) is still below that of the regional average, although pre-primary education is regarded as a key factor in children's academic success.

Secondly, although quantitative results have been achieved in education for all, the quality of education in both the primary and secondary sectors continues to be dependent on the school environment (differentiated access to water and sanitation in the schools), access to educational materials, initial teacher training and teaching methods which are some of the priorities of the new sectoral plan for the development of education and training 2012-2020 (Republic of Burundi, 2015). According to UNESCO experts (UNESCO, 2016), the high repetition rate (38 per cent) is also a sign of the internal ineffectiveness of the system.

Almost 31 per cent of the country's public spending is allocated to education, according to UNESCO, and is one of the largest government expenditure items, but which relies on foreign aid for almost a third of its input. In fact, external support for the education budget decreased by almost 80 per cent between 2014 and 2015.

## 4.5. Gender equality and women's empowerment - Burundi

The status of gender equality and female empowerment is measured in several sectors, shown in box 5 below. These are key sectors in determining the improvement of women's living conditions as well as their contribution to the shared sustainable growth of Africa.

In order to evaluate the scale of gender inequality and to measure the level of parity and empowerment of women in Africa, the Economic Commission for Africa developed a monitoring tool, the African gender and development index. The Index helps political decision makers to evaluate their own performance in implementing policies and programmes designed to put an end to the marginalization of women.

Calculation of scores is based on the gender status index, one of the components of the African gender and development index. For each key indicator, the score calculated is an unweighted arithmetical average: the male/female ratio of the indicator values is multiplied by 10 and the result is rounded to the nearest number. A score of zero represents the highest level of inequality, a score of five represents an average level of parity and a score of 10 represents full parity. Parity levels higher than 10 represent situations where women have outstripped men, regardless of the level of development of the sector concerned.

The majority of the figures used to calculate the scores came from the most recent available national data. For certain indicators, however, countries did not have disaggregated data. Consequently, international data were used and their sources included the results of the survey conducted by ISTEEDU in 2010, the African gender and development index report of 2012, the Interparliamentary Union Report of 2016 and the World Bank report, *Global Data Index 2014*.

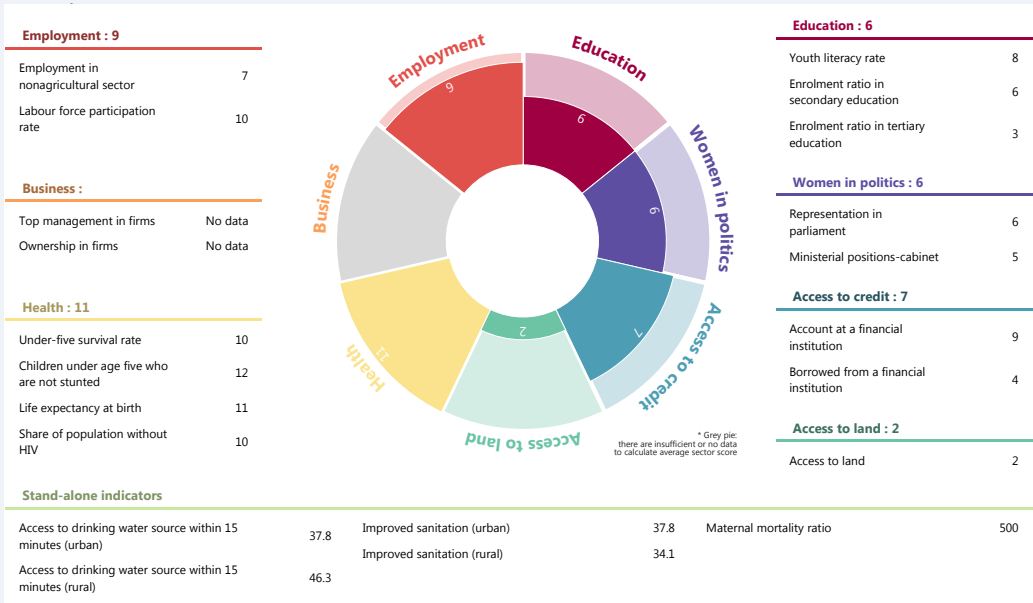
### Box 5: Gender equality and women’s empowerment – Burundi

In Burundi, the figures showed parity in the sectors of health, work and access to credit in terms of the number of accounts opened in a financial institution. The employment rate for women (84.7 per cent) was slightly higher than that of men (82.6 per cent). It should be noted that in the specific indicators for life expectancy at birth, and survival rate of under five, women have surpassed men.

Figures for female representation in parliament show that the country has achieved an average parity score (6) since women constitute 36.4 per cent and men 63.6 per cent of representatives. The percentage of women holding ministerial posts (34.8 per cent) shows average parity in relation to that of men (65.2 per cent).

Burundi also has an above average parity score (6 and 8) in secondary education and the literacy rate of persons aged between 15 and 24, respectively.

Notwithstanding the progress made in the health and employment sectors, it is important to mention serious inequalities in certain areas such as access to land, enrolment in tertiary education and also for loans from financial institutions. Finally, the maternal mortality rate of 500 per 100,000 live births remains a cause for concern.



Source : African Union Commission and ECA, 2015.

\* The data for share of population without HIV indicate for youths from 15-24 years old.

## Thematic analysis: Improvement of agricultural productivity and the structural transformation

With almost 87 per cent of the working population employed in the agricultural sector, contributing more than one third of GDP, the role of agriculture in the economy and Burundian society makes it an indispensable element in any poverty reduction and structural transformation strategy, as highlighted by Barrett and others (2013)<sup>26</sup>. According to these authors, the concentration of extreme poverty in the rural areas in Africa and the low productivity of the agricultural sector give relevance to an investment strategy targeted at agricultural transformation in Africa, which would release greater added value gains and assist the transition to inclusive economies promising growth.

African Development Bank (2016) takes the view that the problem is shared by the majority of African countries, with only a handful having successfully tackled agricultural transformation. Against a background of demographic pressure and urbanization agricultural transformation is a priority if food security is to be achieved in the continent.

From this standpoint, Burundi faces many problems which call for a robust political stance in favour of agricultural transformation; in response, in 2008 Burundi devised a national agricultural strategy for the period 2008-2012 (MINAGRIE, 2008) underpinned by a national agricultural investment plan (MINAGRIE, 2012b)<sup>27</sup>. Agricultural transformation also appears as one of the five pillars of “Vision 2025”. First, the scale of food crops and good rainfall in Burundi should create food self-sufficiency. And yet, almost 48 per cent of rural households suffer from food insecurity (WFP, 2016) and the average daily calorie intake is estimated at 1,650 calories per person, below the recommended 2,250 calories per day, particularly in the form of lipids. The first challenge, therefore, is to feed a growing population affected by food insecurity.

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<sup>26</sup> The authors highlight the need for landlocked countries to invest in infrastructures and human capital if they are to improve their subsistence farming productivity and more especially to enhance the effectiveness of the post-harvest value chains to market their food products and increase the added value of food crop production.

<sup>27</sup> At the time of writing of this report, the new national plan for agricultural investment for the period 2016-2020 had not yet been officially published.

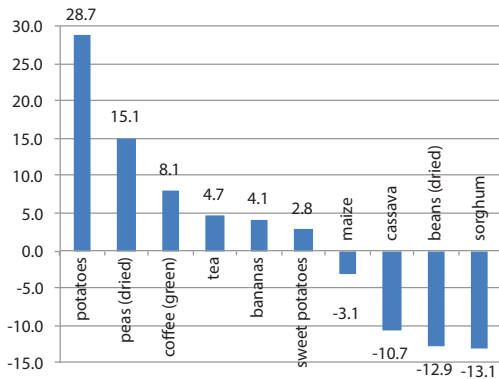
Second, the dependence on two main export crops, coffee and tea, make export revenue somewhat unreliable, in a context of a low increase in the productivity of these two traditional cash crops. It now seems crucial to develop value chains and industrial agriculture. If Burundi is to achieve the necessary transformation of its agriculture it must modernize subsistence farming and diversify its cash crops in order to deal with the triple challenge of demographic pressure, climate change and structural transformation.

### 5.1 Regaining food self-sufficiency: a strategy for subsistence farming

Food crops (bananas, cassava, maize, beans, etc.) occupy about 30 per cent of the surface area of the country and contribute over 95 per cent of the food supply (Ministry of Agriculture, 2012b) compared with 4 per cent for cash crops. But for several decades, the productivity of the sector has been in decline. It is estimated that between 1982 and 2007, gross per capita annual food production fell by 28 per cent whereas over the same period the population increased by 83 per cent<sup>28</sup>. In comparison with the other countries of EAC, yields were 20 to 40 per cent lower, with the exception of coffee, beans, sorghum and sweet potatoes (figures 19 and 20). Furthermore, for beans, maize and cassava, yields per hectare showed a serious decline over the period analysed.

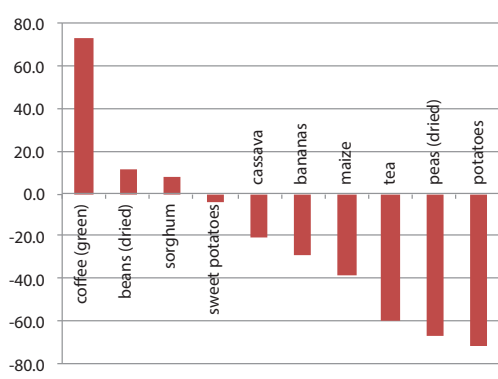
A combination of factors serves to explain the poor productivity of subsistence farming in Burundi:

**Figure 19: Percentage variation rate of yield per hectare in Burundi between 2001-04 and 2009-12**



Source: FAOSTAT and ECA calculations.

**Figure 20: Percentage variation rate of average yield per hectare compared with the average of EAC countries, 2009-12**



Source: FAOSTAT and ECA calculations.

<sup>28</sup> National agricultural strategy, 2008, p. 13. In 1982, Burundi produced 2,858,000 tons of food for a population of 4,398,800 inhabitants: 650 kg of food per person; in 2007, with a population of 8,062,413, its production of 3,779,000 tons provided the equivalent of 469 kg per inhabitant.



### **Diminished soil fertility resulting from over-farming**

Soil mapping carried out in 2013 showed that the majority of Burundian soils were very deficient in trace elements essential to agricultural production and particularly potassium (International Fertilizer Development Center (IFDC), 2013); furthermore, more than one third of the country's soils were classified as acid and therefore not very fertile.

### **Low use of agricultural inputs**

Mineral fertilizers continue to be little used: in 2013, their use was estimated at 4 kg per hectare, below the average of 8 kg per hectare in Africa and about 120 kg per hectare worldwide. This figure is also lower than the goal of 50 kg per hectare fixed by the Abuja Declaration of 2006 on Fertilizers for a Green Revolution in Africa (IFDC, 2015).

### **Parcelling out of land associated with the population increase**

The average size of land parcels for a household of five people is now about 0.5 ha and would be 0.2 ha by 2050 if the current trend of demographic growth were to be maintained.

### **Increase of meteorological events and environmental risks associated with climate change and over-farming**

Since 1997 and the entrenchment of the consequences of El Niño in the subregion, there have been many episodes of drought and severe floods. The floods of November 2015 affected about 30,000 people and caused damage to 13,000 hectares of farmland. At the same time, the effects of climate change combined with pressure on land increased erosion on particularly sloping land contours, while the wetlands and forested areas (Tokindang and Gbetnkom, 2016), which keep ecosystems in balance, are also threatened by the pressure on land.

### **Persistence of land conflicts**

While 72 per cent of litigation is related to land conflicts (International Crisis Group, 2014), land reform is perceived in Burundi as an essential part of rural modernization and the consolidation of peace. It formed part of the Arusha peace agreements, first, by the return of 700,000 refugees from 2005 onwards, second, through land law reform. On the latter point, the revision of the land tenure code of 2011, the decentralization of land registration services and the issuance of land titles helped to improve the situation and particularly to facilitate access to rural credit facilities. Some analyses nevertheless believe that reform should go further, particularly to reduce the inequalities related to access to land. The analysis conducted in the context of the national agricultural strategy highlighted other problems, of a different order: agricultural (low use of effective inputs for production, resurgence of diseases such as the mosaic virus in cassava), climatic (disorganization of rain-fed farming), technological (poor use of irrigation, processing and preserving of agricultural products, the low level of agricultural research, for the promotion of other sources of energy), institutional (low effectiveness of support services for production and low level of involvement by the

private sector) and socio-economic (poor monetization of the rural economy and low access to credit). Faced with these difficulties, the Burundian Government put the modernization of the agricultural sector at the very heart of its poverty reduction strategy. One of the main axes of the national agricultural strategy established in 2008 sought to “increase productivity and agriculture production in order to restore food self-sufficiency” (MINAGRIE, 2008).

### **By a fertilizer subsidy programme ...**

Alongside the development of irrigated land, the development of marshes and restoration of forest cover, one of the flagship actions was to develop a programme to supply subsidized fertilizers<sup>29</sup>. Established in 2013, this system of decreasing subsidy was based on the lessons learned from the examples of Malawi and Rwanda (MINAGRIE, 2012a). Through the implementation of the national fertilizer subsidy programme, some 350,000 farming households purchased 18,500 tons of fertiliser in 2013, more than twice the quantity normally bought before the project was set up (IFDC, 2015); in 2014, the quantity purchased was about 20,000 tons. The revenue resulting from the use of appropriate fertilizers increased by about 18 per cent. Pilot research activities conducted with ISABU highlighted a potential increase in yields of about 70 per cent with enriched fertilizer formulas designed for Burundian soils. Recent studies conducted by the United Nations Environment Programme, however, warn against the unregulated use of chemical fertilizers (UNEP, 2013)<sup>30</sup>.

### **.... and increased budget support**

In compliance with the Comprehensive Africa Agriculture Development Programme (CAADP or Maputo Declaration) adopted by the African Union in 2003 which set the goal of devoting at least 10 per cent of national budget resources to the agricultural sector, Burundi substantially increased its funding of the agricultural sector (table 2). It should be noted, however, that this allocation was made possible only by a substantial external contribution, now threatened by the current political crisis.

The policy to subsidize inputs was not the only government policy put in place in the context of the national agricultural strategy, but it was the one which was most obviously implemented. Mention may also be made of the national strategy for financial inclusion which was designed to develop access to credit, particularly in the rural areas<sup>31</sup>, as well as the research master plan to reform the Institute for Agriculture and the rural infrastructure rehabilitation programme, all catalysts of agricultural transformation.

<sup>29</sup> Through a privatized distribution network, farmers get fertilizers that are 60% subsidized by the Government (interview with the Minister of Agriculture, August 2016).

<sup>30</sup> UNEP shows that the use of chemical fertilizers, although necessary to increase world food production, poses a major threat to the environment and food security in the long term if excessively or improperly used. UNEP advocates a more efficient use of fertilizers combined with integrated farming practices that respect the ecosystems.

<sup>31</sup> The rate of financial inclusion in the rural areas is only 8% compared with an average of 23% nationally (Ministry of Finance, 2014b).

**Table 2: Evolution of the proportion of the budget allocated to the agricultural sector (in billions of Burundi francs)**

	2008	2009	2010	2011	2012	2013	2014
General budget (national resources)			675.7	697.1	794.9	818.1	813.1
MINAGRIE budget (national resources)	8.3	16.9	18	43.2	46	38.8	33
Share of agriculture (per cent)			2%	6.2 %	5.8%	4.7 %	4.1 %
General budget (+ external resources)	520.4	578.7	685.7	1026.2	1268.2	1413	1438.1
MINAGRIE budget (+ external resources)	11.2	64.7	44	75.7	143.8	128	173
Share of agriculture ( per cent)	2 %	11.2%	6.4 %	7.4 %	11.3 %	9.1 %	12 %

Source: MINAGRIE.

## 5.2 Generating income in agribusiness: diversification and competitiveness

The other facet of the national agricultural strategy deals with cash crops in two principal ways: improvement of productivity of traditional crops and diversification of crops, the goal being to move beyond subsistence farming to achieve family farming that generates income (FAO, 2010).

### Tea and coffee: traditional crops struggling to be competitive

The tea and coffee sectors of Burundi are responsible for more than 60 per cent of the country's export revenue, a proportion that has steadily declined in favour of manufactured goods, while the cash earnings from these two crops are subject to severe variations resulting from production hazards and world market prices. Furthermore, an analysis of the national strategy shows that the coffee trees are ageing – more than 70 per cent are over 30 years old – which diminishes production capacities and results in a decrease in the quality of the coffee produced, while FAO experts note persistent inefficiency in the post-harvest sectors, notwithstanding a strategy to privatize the washing stations<sup>32</sup> (FAO, 2015). A partnership with the World Bank (renewed in 2016 for \$55 million) is intended to improve the sector's yields and the efficiency of the post-harvest operations. The new strategy to revive the coffee sector, launched at the beginning of 2015, is designed to enhance the quality of the coffee produced, while improving the productivity of the sector and providing a greater share of

<sup>32</sup> Launched in partnership with the World Bank, this privatization strategy facilitated the sale of some of the washing stations to foreign multinationals. United Nations independent experts expressed the view in 2013 that the interests of the coffee producers had not been taken sufficiently into account in the reform process since the strategy did not allow them to develop the value chain.

income for the coffee growers<sup>33</sup>. It should allow Burundi greater participation in the creation of a value chain in the sector.

### **New sectors: the challenge of diversification**

Because Burundi has climatic diversity and good rainfall it should be able to develop new production sectors for export (bananas, patchouli, macadamia nuts), or to substitute for imports (rice, sugar, oil seeds). The implementation of this diversification strategy is compromised by the current sociopolitical instability and the reluctance of donors and the Government seems to be focusing its action on the reduction of food insecurity. Furthermore, the strategy is designed to be supported by a subprogramme for infrastructures, particularly road rehabilitation, construction of regional markets and collection and storage facilities, essential for the development of successful agribusiness but which requires costly investment.

Furthermore, other essential elements that are integral to the success of the structural transformation of Burundian agriculture and poverty reduction include the organization of the producers sectors and combating the impact of climate change, which still have to be achieved.

In addition, it must be noted that the analysis of the pathways to structural transformation (Timmer, 2007) tends to show that the structural transformation of low income countries may go hand-in-hand with increased rural poverty for a relatively long transition period and that, in the face of this risk, improving agricultural productivity continues to be a key strategy.

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<sup>33</sup> The modernization of the coffee sector seems to be one of the priority areas of the new national agricultural investment programme (PNIA).

## 6. National data quality evaluation

**Methodological note:** The quality of national data sources for key indicators in the country profiles was evaluated. The results are presented in colour codes, with green indicating that the data source is “good”; yellow, “satisfactory” and red, “needs improvement”.

The evaluation focused on the transparency and accessibility of the national data sources, while taking into consideration of the periodicity of the published data based on the timeliness and frequency of the data updates in accordance with international standards. It measured the comparability of the data series based on length, definition and standard units of measurement. Also reviewed were the accessibility of the database to the general public, the format of the data and the ease in which the data can be downloaded and shared. Data citations together with references to primary or secondary sources, was also assessed. Finally, the evaluation checked the completeness of metadata for data release and the clarity of documentation and notes.

Demography	Value	Evaluation
Population (in millions)	10.1 (2016)	1
Children (0-14 years, as a percentage)	44 (2016)	1
Adults (15-64 years, as a percentage)	53.8 (2016)	1
Elderly persons (over 65 years, as a percentage)	2.2 (2016)	1
Average annual growth rate	3 (2016)	1
Urban population (as a percentage)	13.2 (2013)	2
Gross birth rate (per 1,000)	37.9 (2013)	2
Gross death rate (per 1,000)	13.7 (2013)	2
Synthetic fertility index	5.3 (2013)	2

Key macroeconomic and sectoral performance	Value	Evaluation
Current GDP (in billions of Burundi francs)	4 528 (2015)	3
Growth rate of real GDP (as a percentage)	-3,9 (2015)	3
Annual inflation rate (as a percentage)	5,6 (2015)	4

Economic trends and performance indicators	Value	Evaluation
Exports goods and services - Total (in billions of Burundi francs)	282.8 (2015)	4
Imports goods and services - Total (in billions of Burundi francs)	1299.2 (2015)	4

Education and employment	Value	Evaluation
Net enrolment ratio in primary education (as a percentage)	88.2 (2015)	5
Completion rate of primary education (as a percentage)	66.6 (2014)	5
Literacy rate of persons aged 15-24, male and female	87 (2010)	5
Population below the national poverty threshold (as a percentage)	64.6 (2012)	6

Health	Value	Evaluation
Mortality rate of children under five (per 1 000)	96 (2010)	7
Infant mortality rate (per 1 000)	59 (2010)	2
Maternal mortality rate (per 100 000)	500 (2010)	7
Prevalence of underweight in children under five	28.8 (2010)	7
Rate of prevalence of HIV and AIDS in persons aged 15-24 (as a percentage)	3.1 (2010)	7

### Data Sources Code Index

1. ISTEERU, Demographic projections report 2008-2030
2. ISTEERU, Database for Sustainable Human Development indicators, 2015
3. Standing committee on macroeconomic and budget measures, Macroeconomic framework 2017-2019
4. Bank of the Republic of Burundi
5. Demographic survey of households, UNDP, UNESCO
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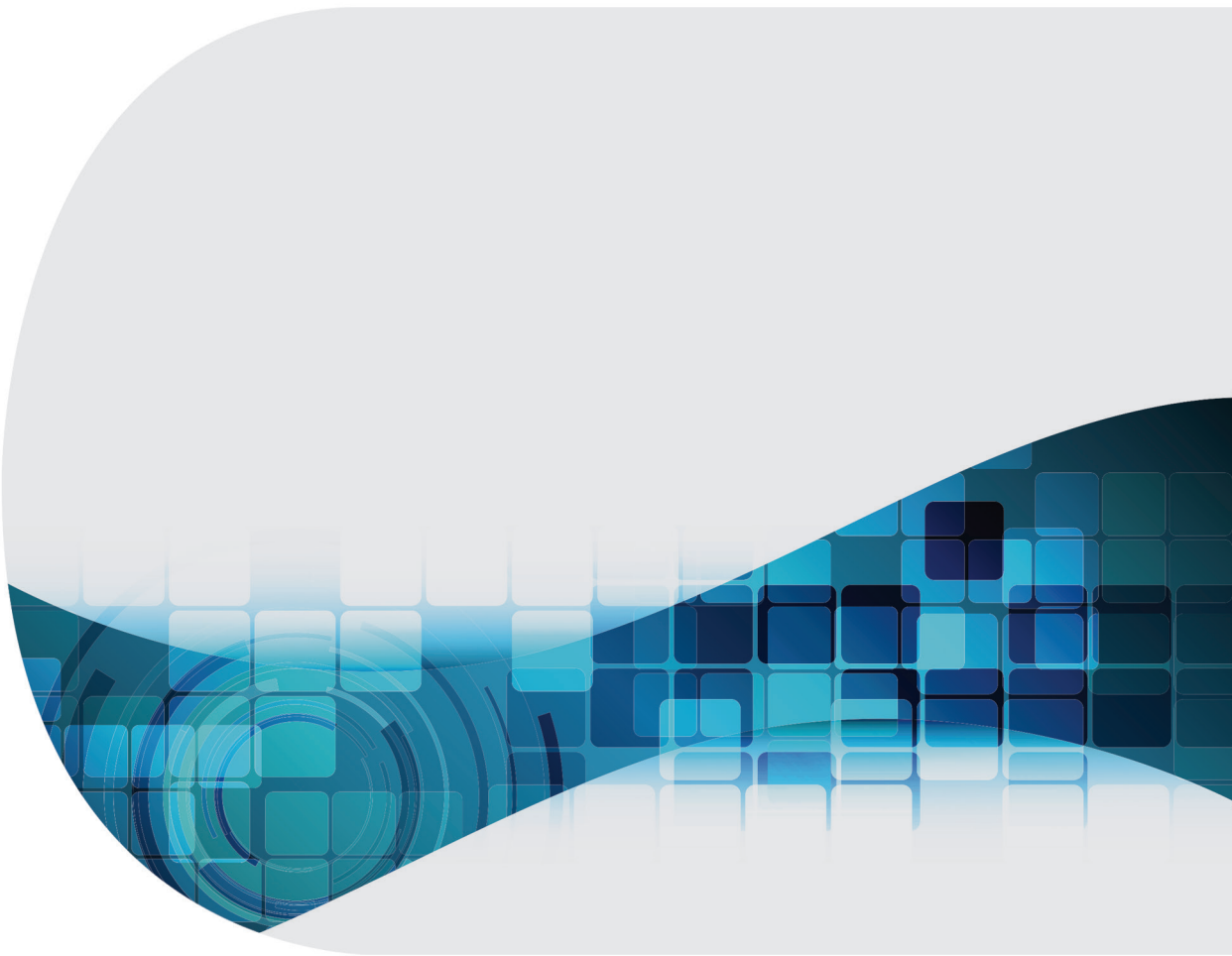
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