

Socio-economic aspects of the Maghreb

Statistics in focus

GENERAL AND REGIONAL STATISTICS

4/2005

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One of the main features of recent developments in the societies of the Maghreb is the slowing rate of population growth. As a consequence there has been a significant shift in the relative weight of the generations. Although sustained economic growth since 2001 has allowed the employment situation to improve, unemployment remains high as large cohorts enter the labour market.

Slower population growth

Between 1990 and 2003, the Maghreb recorded a population increase of 14.4 million people, which is nearly equal to that of the entire European Union (EU 25) over the same period (15.8 million). However, the growth rate slowed considerably during this period. Thus, the population of Algeria, which grew by 2% annually between 1990 and 1996, is now growing at a rate of 1.5%, which is similar to the population growth rate in Morocco. Tunisia recorded the most marked slowdown. The annual rate of population increase is about 0.6%, which is close to the average for the European Union.

	Algeria	Morocco	Tunisia	Maghreb	EU-25
2003	31.848	30.088	9.840	71.776	454.580
2000	30.386	28.705	9.564	68.655	451.080
1995	28.060	26.386	8.958	63.404	446.390
1990	25.022	24.177	8.154	57.353	438.712

table 1: population on 1 January (thousand inhabitants, Eurostat and NSI)

The slowdown is the result, firstly, of a sharp drop in fertility. Total fertility is about 2.5 children per woman in Algeria and Morocco. It is just at population replacement level in Tunisia (2.06). Although this is still much higher than in the EU (1.48), it is generally lower than in other countries of the Mediterranean region, where it is mostly close to 3 children per women.

This general decline in fertility has been accompanied by significant, steady increases in life expectancy. The increase was particularly marked in Algeria, where both men's and women's life expectancy has increased by six years since 1994. The increases were less marked in Morocco and Tunisia (between 2 and 3 years over the same period). Although it has not reached the average for the European Union, life expectancy in the Maghreb has caught up with that in the new EU Member States. In the Mediterranean region, only Israel has higher life expectancy.

			2003	1994
Algeria	Life expectancy at birth	Men	72.9	66.7
		Women	74.9	68.4
	Total fertility rate (children per women)	2.4	4.0	
Morocco	Life expectancy at birth	Men	68.5	66.3
		Women	72.7	69.5
	Total fertility rate (children per women)	2.5	3.3	
Tunisia	Life expectancy at birth	Men	71.1	69.1
		Women	75.1	72.9
	Total fertility rate (children per women)	2.1	2.9	

Table 2: Some demographic indicators (sources : Eurostat and NSI)



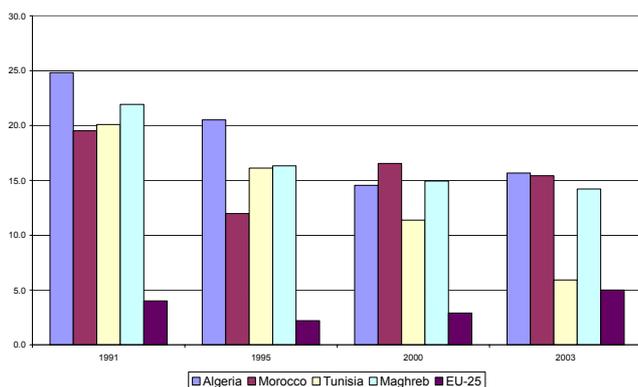


Figure 1: Rate of annual change in population (per thousand)

The Maghreb has a younger population than the European Union. The proportion of persons under 15 years of age has risen to slightly more than 30%, compared with 16.4% in the EU. Changes in fertility rates in the last fifteen years have largely affected the population structure of the Maghreb. The age dependency ratio¹ has improved considerably. In Algeria, it stood at 85% in 1990 and at 55.1% in 2003, although the improvement was less pronounced in Morocco and Tunisia, due to a smaller proportion of the population under 15 years of age in 1990. This change is an automatic effect of declining fertility. The number of persons entering the under-15 age group is smaller than the number entering the 15-64 age group. The increase in life expectancy is too recent to have had any significant impact on the share accounted for by persons in the 65+ age group.

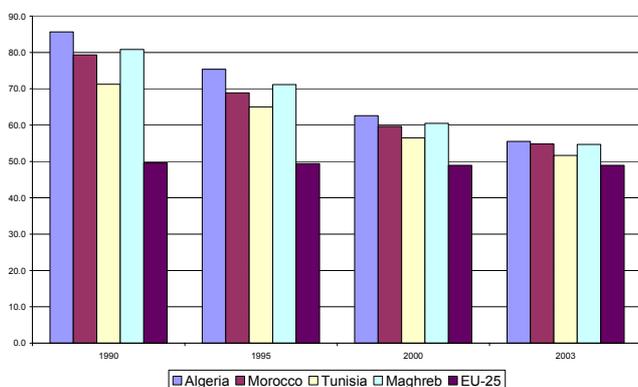


Figure 2: Young/old age dependency ratio¹ (%)

Employment still a major issue

The state of the labour market varies somewhat between the three countries. Algeria still has a relatively high unemployment rate (17.7% in 2004, compared with 11.9% in Morocco [figure for 2003] and 14.3% in Tunisia). However, the two latter countries have enjoyed a degree of stability since 2000 (an improvement of about 2 percentage points), while Algeria experienced

¹ The dependency ratio is the ratio of the population under 15 and over 65 to the population aged between 15 and 64.

an unemployment rate close to 30% in 2000, i.e. there was an improvement of 13 percentage points between then and 2004. In these three countries, under-employment affects women slightly more than it does men (by one or two percentage points). The situation of the under-25s continues to be more serious. Although Morocco has managed to limit the unemployment rate in that age group to 17% (5 percentage points more than in the working population as a whole), the rates in Algeria and Tunisia are higher (32.3% in Algeria, 31% in Tunisia).

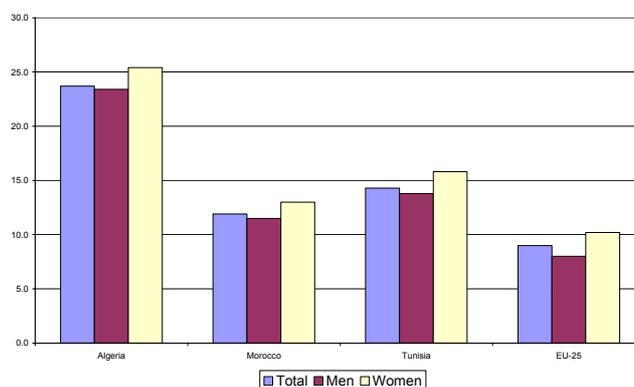


Figure 3: Unemployment rate in 2003 (% of active population, source: Eurostat and NSIs)

Solid growth since 2001

Since 2001, the three Maghreb countries have experienced regular, consistent growth in gross domestic product, in contrast to the sluggishness seen in the European Union and patchy growth in other Mediterranean countries. The average recorded growth rate over the period was 4.0% in Algeria (with a markedly upward trend), 4.8% in Morocco and 5.6% in Tunisia.

	2001	2002	2003
Algeria	2.1	4.1	6.9
Morocco	6.3	3.2	5.5
Tunisia	7.9	4.1	7.6
EU-25	1.8	1.1	1.0

Table 3: Growth GDP rate at constant prices (source Eurostat and NSIs)

In per capita terms, however, wealth creation remains far below the levels of the poorer countries of the European Union (€1 700 per capita as of 2003). Agriculture continues to account for a major share, particularly in Algeria and Morocco. More than half of Algerian output is accounted for by the industrial sector, owing to that country's high level of gas and oil production. At the opposite end of the spectrum, more than two-thirds of Tunisia's wealth is generated by the service sector. Since 1995, the respective weight of the various sectors has changed significantly. Overall investment has remained stable since 1995. The share of GDP devoted to gross fixed capital formation remains at about 25%.

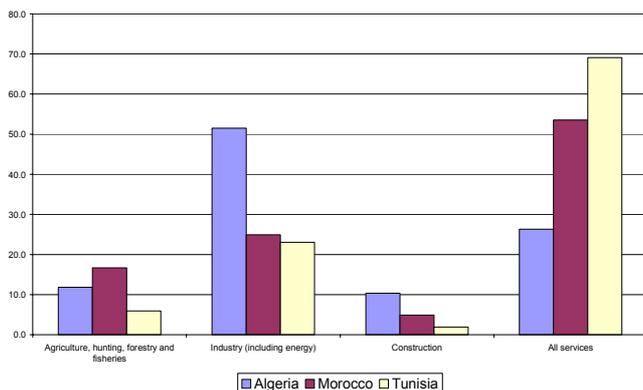


Figure 4: Share of added value between economic sectors (2003, sources: NSIs)

Foreign trade: strong ties with the European Union

The growth in the Maghreb economies is largely dependent on their external markets. About 40% of the GDP of Algeria and Tunisia is accounted for by exports (38.3% and 43.8% respectively in 2003). Morocco is less dependent on exports, which accounted for 27.9% of its GDP. The Maghreb's foreign trade is very much focused on the European Union. In terms of exports, the European Union is a crucial trading partner for the Maghreb countries, accounting for more than two-thirds of their foreign trade in 2003 (80% in the case of Tunisia).

Historical ties mean that the region's trade is most intense with those EU countries which lie on the Mediterranean. France, Italy, Spain and Portugal absorb more than 50% of the Maghreb's exports.

	2001	2002	2003	Share accounted for by the main countries in 2003 (%)
All destinations	36.726.3	35.486.2	36.017.6	
of which:				
EU-25	25.354.0	24.511.2	23.756.4	66.0
France	7.980.7	7.756.9	7.580.2	21.0
Italy	6.988.1	6.137.4	5.930.0	16.5
Spain	2.935.1	2.726.1	2.898.7	8.0
Portugal	1.531.6	1.675.3	1.885.7	5.2

Table 4: Exports from Maghreb (millions of euros, source: Eurostat)

In terms of imports, the Maghreb countries are slightly less dependent on the EU, which nonetheless supplied nearly 63% of the region's imports in 2003. As in the case of exports, Tunisia is the country most dependent on the EU, with more than 73% of its imports originating there.

	2001	2002	2003	Share accounted for by the main countries in 2003 (%)
All countries of origin	34.069.2	35.707.5	33.513.0	
of which:				
EU-25	20.946.2	21.623.4	20.970.3	62.6
France	8.171.8	8.090.4	7.893.3	23.6
Italy	3.832.8	3.931.8	3.696.8	11.0
Germany	2.525.3	2.494.0	2.239.0	6.7
Spain	2.244.6	2.635.2	2.730.3	8.1
United Kingdom	1.208.6	1.188.9	1.074.2	3.2

Table 5: Imports of Maghreb (millions of euros, source: Eurostat).

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Important terms used

The data on the Maghreb countries were collected as part of the preparatory work for the MED-STAT II cooperation programme

Total population

This can be either the population as of 1 January or the average population for the year. Unless otherwise stated, the total population is that as of 1 January.

Total rate of increase

Relationship between the total population increase for the period under consideration and the average population of the geographical area in question over that period.

Life expectancy at birth

Average number of years that a new-born baby can hope to live if it goes through life under current conditions of mortality (age-specific mortality rates).

Economic fertility indicator (total fertility rate)

The mean number of children that would be born alive to a woman during her lifetime if she were to pass through her child-bearing years conforming to the fertility rates for women of her age in a given year. It therefore represents the final number of children born to a notional generation, calculated by adding together the age-specific fertility rates

for the year in question (the number of women of each age is assumed to be the same). The fertility rate is also used as an indicator of whether the population replacement level is being attained.

Annual unemployment rate of the overall working population and by sex (in %)

The unemployment rate is the number of unemployed persons expressed as a percentage of the working population (other than persons living in collective households). The working population is the total number of employed and unemployed persons. The unemployment rates published by Eurostat are compiled in accordance with the recommendations of the 13th International Conference of Labour Statisticians organised by the International Labour Office (ILO) in 1982.

The special trade system covers the following flows:

- 1) imported goods placed in free circulation and/or for domestic use, from the moment of arriving in the territory or leaving the warehouse, imports for inward processing and imports after outward processing
- 2) exports of goods produced or in free circulation in the country, exports after inward processing and exports for outward processing.

The EU's trade statistics are compiled in accordance with the special trade system.

Further information:

Databases

Algeria	Office National des Statistiques (ONS)	http://www.ons.dz
Morocco	Direction de la Statistique (DS)	http://www.statistic-hcp.ma/
Tunisia	Institut National de la Statistique (INS)	http://www.ins.nat.tn/

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