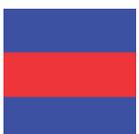




The Republic of the Union of Myanmar

2014 Myanmar Population and Housing Census

Policy Brief on Population Projections



Department of Population
Ministry of Labour, Immigration and Population
With technical assistance from UNFPA

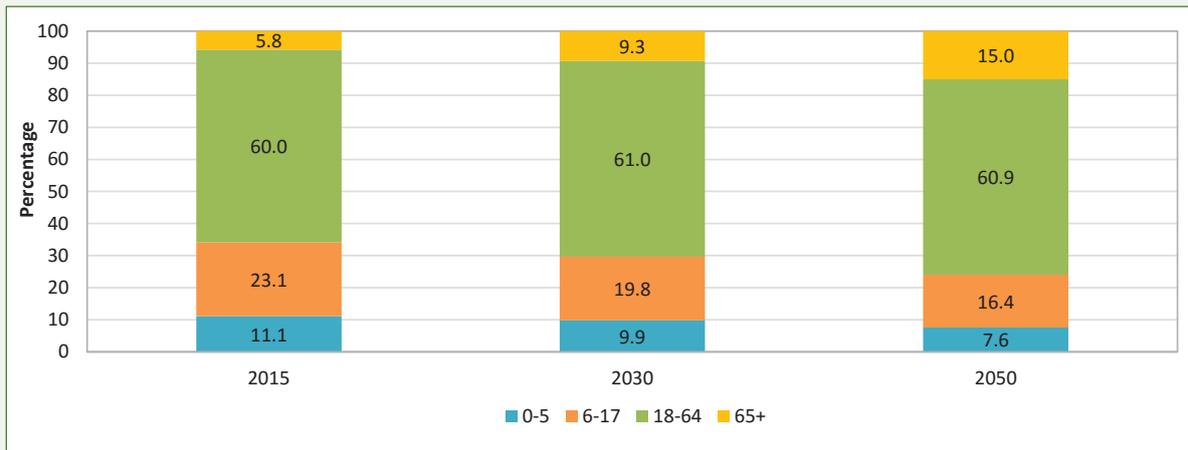




Key points

- (1) Differences in the expected future population sizes of states and regions need to be taken into account when allocating funds from the Union level.
- (2) For the next few decades, the country will have a favourable ratio of working-age people to children and older persons. To fully exploit this “demographic dividend”, savings and investments for the modernization of agriculture and the development of manufacturing need to be encouraged.
- (3) The forecasted slight drop in the school-age population between 2015 and 2030 will help to achieve the goal to make primary schooling free and compulsory.
- (4) Myanmar’s economic progress depends to a large extent on improving the skills of the labour force. Future population change favours rises in the proportion who can benefit from secondary and college education. The need to match training to the skills needed by the labour market will be important.
- (5) The rise in the working-age population is a positive trend. However, there is currently a large reservoir of women who are confined to domestic work. Increased employment of women and their participation in the productive economy outside the home will further boost the size of the labour force and contribute to economic progress.
- (6) Between 2015 and 2030, the number of people aged 65 years or above will double. This will potentially increase the number of people with disabilities and chronic ill-health. The health system should anticipate the needs of older people by appropriate training of staff and the increased provision of institutional care for those with severe conditions.
- (7) Because women live longer than men, well over half of the older population are women and many are widows. Strong traditions of family support for older widows may be threatened by migration of children to towns and cities. The welfare of the expanding number of widows needs to be carefully monitored.
- (8) Three main policy options and combinations of these exist to improve the financial position of older people: ensure that workers in the private sector have fair pension schemes; encourage individuals to save for old age; and encourage people to continue to work at older ages.
- (9) The relatively rapid increase in the urban population has implications for housing, pollution and congestion, particularly in major cities.

Figure 1: Trends in national age structure, 2015, 2030, 2050



Myanmar's population will continue to grow, from 52 million in 2014 reaching 60 million by 2032. However, this growth will be uneven. The urban population will expand faster than the rural population. Some states/regions can expect a major expansion of inhabitants while others may even decrease slightly.

Between 2014 and 2030, life expectancy at birth is expected to improve by about five years and the fertility rate to drop from 2.5 to 2.2 births on average per woman. The number of older people will increase rapidly; those of working age will rise more slowly; while the number of school-aged children will fall slightly. These differences present both opportunities and challenges for Myanmar's future.

Births and pre-school children: opportunities for improved health services

Between 2017 and 2030, the number of children born per year will remain stable at a little over one million and the number of pre-school children will not change significantly. Childbirth and infants make large demands on health services, for antenatal care, supervised deliveries, immunizations, and care of childhood illnesses.

Currently, according to the 2015-16 Myanmar Demographic Health Survey, only 60 per cent of deliveries are assisted by health staff and only 55 per cent of children receive all basic vaccinations. There is extensive scope for improvement, and the expectation that the numbers of births and infants will remain stable over the next 15 or so years represents an opportunity to raise levels of health care for mothers and their children. Increases in the numbers of health staff should result in progress towards the ideal of 100 per cent coverage of deliveries by health staff.

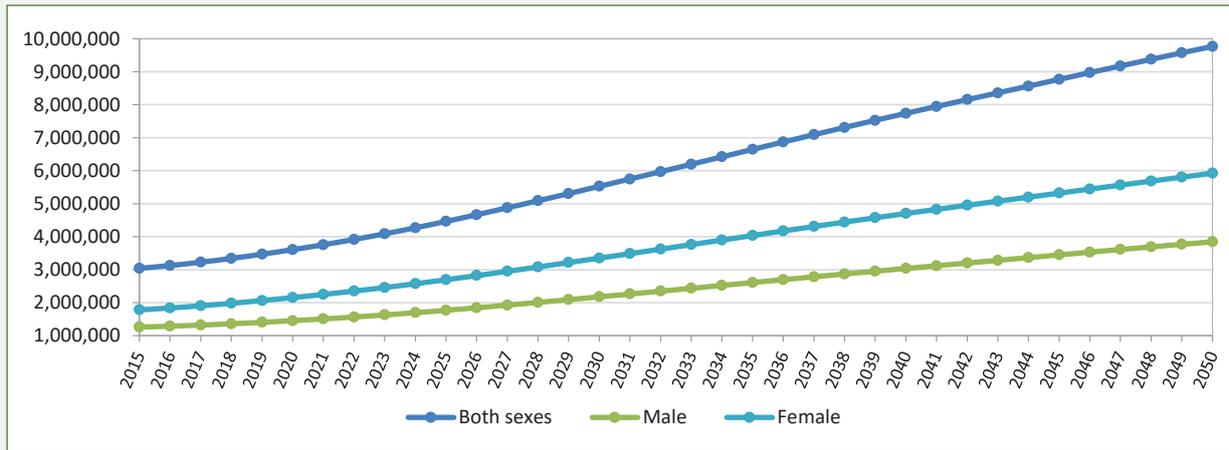
The school-age population: another opportunity

Under the new education policy, basic schooling will be extended to 12 years starting at age six with 5 years of primary schooling, followed by 4 years of middle or lower secondary school and ending at age 17 after three years of upper secondary schooling. Between 2014 and 2030, the number of children aged 6 to 17 years is expected to drop slightly from 12.1 million to 11.8 million and will fall further in later years.

This is good news. It makes the Government's plan to introduce free and compulsory primary schooling a realistic proposition. Nevertheless, it is ambitious and requires a major investment in school premises, equipment and teacher training. In 2014, nearly 30 per cent of children aged 5-9 and 10-14 years were not attending school.

Myanmar's future prosperity depends, to a large extent, on the creation of a skilled labour force which will be necessary for the modernization of the agricultural sector and the development of flourishing manufacturing and service sectors of the economy. This will require the expansion of secondary and higher education. Again, population trends are favourable. In the coming decades, the numbers of young people of upper secondary and college age will remain stable. Close attention will be needed to match training to job opportunities. There is an equally urgent need to adequately focus on technical and vocational training in order to develop the much needed skilled labour force.

Figure 2: Population aged 65+, 2015-2050



The working-age population and the need for job creation

The working-age population is usually defined as those aged between 15 and 64 years. In contrast to the slight decline in the numbers of children under 15 years, this age band will increase from 34.4 million in 2015 to 39.2 million in 2030, a rise of 14 per cent, and to 42.4 million by the middle of the century. As a proportion of the total population, the working-age band will remain constant at about two-thirds until the middle of the century, after which it will start to decline as smaller numbers reach 15 years and larger numbers attain the age of 65.

It is obviously an economic advantage for a country to have relatively few dependents (children and older people) compared with potential workers. The ratio of dependent young children plus older individuals aged 65 or more to those in their prime working ages is called the dependency ratio. In Myanmar this ratio remains constant at about 53 for the next few decades, meaning that, for every 100 workers, there are 53 unproductive children and older people. Myanmar, like most ASEAN countries, is in a favourable position compared with many other countries. In high-income countries, for instance, the ratio will rise from 51 in 2015 to an expected 72 by the middle of the century. In China, the trends will be more dramatic, from 38 in 2015 to 67 in 2050.

Myanmar's demographic advantage can be fully exploited if the economy provides opportunities for work with improved productivity. In 2014, 82 per cent of men aged 15 to 64 were employed. The employment level is low at ages 15 to 19, when many are still in full-time schooling, and peaks at 90 per cent between the ages of 30 to 49, but then falls to 83 per cent among those in their late 50s and further to 66 per cent among the 60 to 64 age group. Half of men in their late 60s and one-third in their early 70s are still working.

In addition to improved skills of workers, increases in productivity will also require the encouragement of domestic savings for investment, attraction of foreign investment, attention to infrastructure, such as electricity and transport, and sound macro-economic policies.

The growth of the population aged 15 to 64 together with the reservoir of unemployed women, as mentioned above, means that Myanmar should have an ample labour force in the coming decades. Economic development and urbanization will inevitably mean a shift from agriculture to more productive jobs in manufacturing and services. The creation of these modern sector jobs for increasingly well-educated young men and women has to be a top priority. Matching the education system to the skills required for a modernizing economy is never easy but is one of the keys to success.

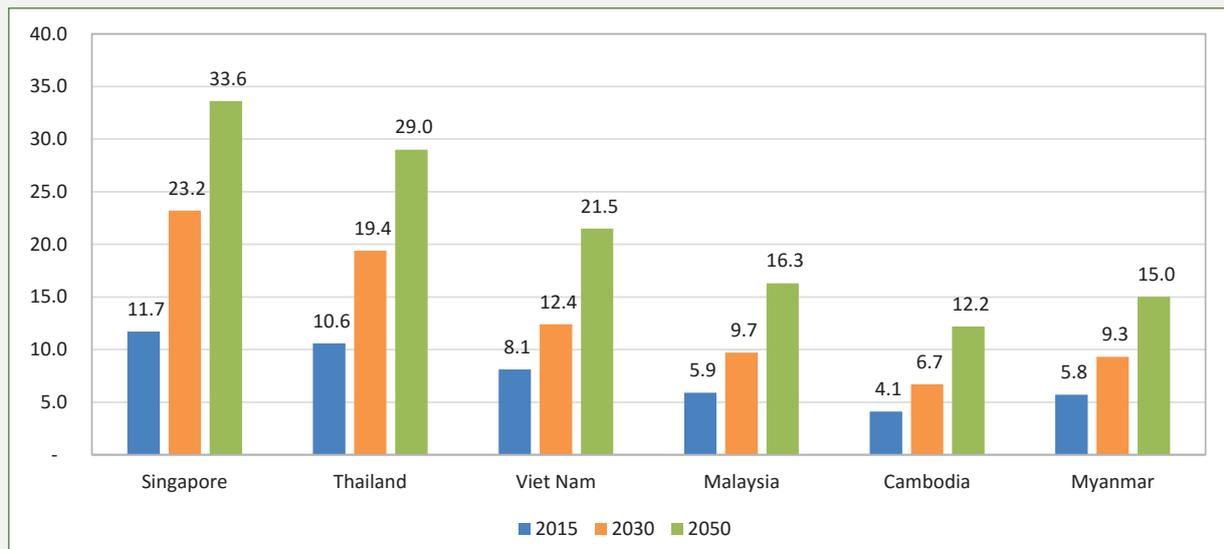
The challenges of an ageing population

By far the biggest change in the country's age distribution will be the increase in the older population. Between 2015 and 2035, the number of persons aged 65 years and over will more than double from 3 million to 6.6 million. By 2050, the older population will number 9.8 million. The number of older people per 100 in the working ages of 15 to 64 will rise from 9 in 2015 to 16 by 2035 and to a further 23 by the middle of the century. All ASEAN countries will experience large increases in their elderly populations and this trend will be particularly pronounced in Singapore, Thailand and Viet Nam.

Implications for health care

The 2014 Census enquired about disabilities in seeing, hearing, walking and remembering or concentrating. The proportion of persons with one or more disabilities rises steeply with age, from about 10 per cent of those in their 50s to 19 per cent for the age group 65 to 69, and to over 40 per cent for those aged 80 years or above. The doubling in the number

Figure 3: Proportion of population aged 65+, selected Asean countries



of older people will inevitably drive up the numbers with disabilities and chronic conditions. The numbers in need of special care or treatment may not double because general health should improve. Nevertheless, a steep rise can be anticipated. The appropriate policy response is to ensure that health staff are trained in the care of older people. An increase in institutional care for those with severe conditions will also be necessary. An ageing population implies the need for increased health budgets.

The loss of a spouse is much more common for women than men. The census identified a total of almost two million widows. One-third of women in their 60s were widows, rising to 60 per cent of those in their 70s. Widows are a potentially vulnerable group and most will be dependent on children or other relatives for support. Their number is bound to increase between now and 2030 and their welfare needs to be closely monitored. As explained above, currently existing safety nets may cease to exist because of on-going migration patterns.

Economic consequences

There is no escape from the fact that an ageing population brings economic problems. The income of workers has to be spent on the support of older parents instead of being saved and invested. The cost of health care escalates. The cost of government pensions also rises but only a minority of the labour force are entitled to this form of support. The 2014 Census enumerated 1.4 million government employees - a relatively small number compared with the 7.4 million employed in the private sector and 8.7 million who were self-employed.

Three main policy responses to these financial implications can be identified: ensure that private sector employers have fair pension schemes for their workers; encourage workers to save for their

retirement; and encourage people to continue to work longer.

Ensuring fair private sector pension schemes is largely a matter of legislation and enforcement. In middle- and high-income countries, most schemes require a contribution from both employer and employee.

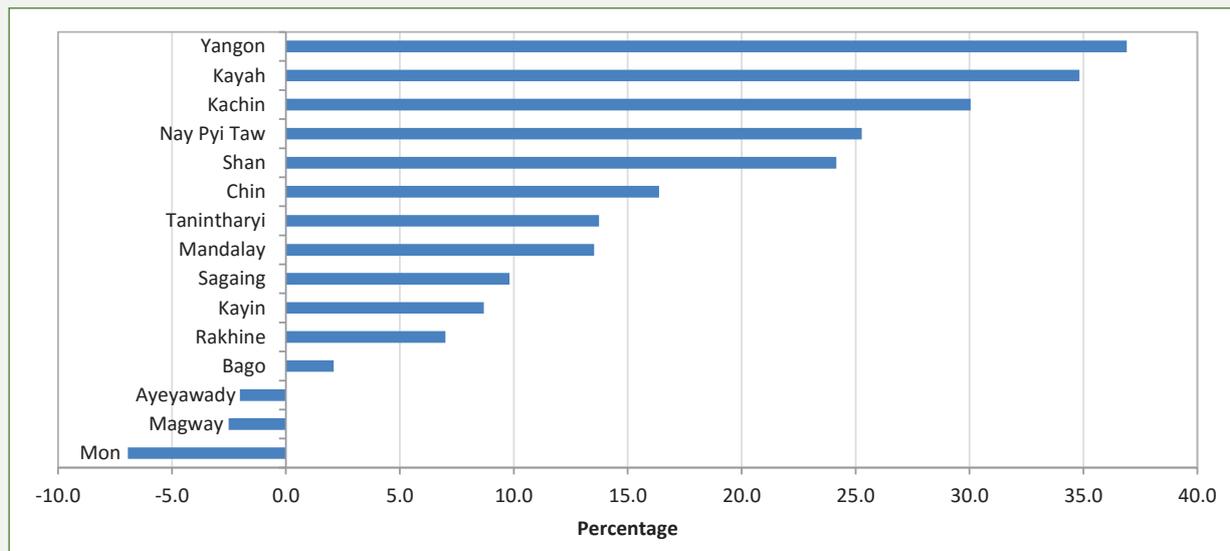
Savings can be encouraged by widespread access to financial institutions, such as banks and insurance companies. Use of information technology, such as mobile telephones, can enhance access. Trust in financial institutions is essential and some form of government oversight may be required.

Encouraging people to continue to work at older ages is always controversial. Between 2015 and 2030, life expectancy at birth of women is expected to rise from 69 to 74 years and that of men from 60 to 66 years. In 2014, men reaching the age of 60, on average, could expect to live for a further 14 years while women could expect to live an additional 18 years. By 2030, the life span after age 60 will have increased and corresponding improvements in general health can be expected.

The projected increase in life expectancy can be used to justify a later retirement age, which is currently set at 60 years for government employees. Raising retirement ages for managerial, administrative and clerical occupations is clearly more defensible than for those engaged in hard physical labour and this consideration should be kept in mind.

Setting retirement ages is largely irrelevant for the large number of self-employed but it is reasonable to expect that improved health will encourage them to delay retirement. Already one-third of men in their early 70s are still working and this proportion should rise as health improves.

Figure 4: Percentage changes in total population of state/region, 2015-2030



Urbanization: meeting the demand for housing and infrastructure

Compared with other Asian countries, Myanmar remains a predominantly rural country. In 2014, 70 per cent of the population lived in rural areas. Urbanization is an integral part of economic modernization and it is definite that the urban population will increase at a faster pace than the rural population. The speed of this shift is difficult to forecast because much depends on the development of manufacturing.

The projections based on the 2014 Census envisage that the rural population will grow by 10 per cent between 2015 and 2030 whereas the urban population will expand by 21 per cent, from 15.4 to 18.7 million. Much of this urban growth of 3.3 million, most likely to be about 60 per cent, will be concentrated in Yangon.

The expected addition of about 220,000 people per year in the urban population has all sorts of implications for housing, infrastructure and pollution,

State/region differences

Population growth in states/regions depends on the birth rate, the death rate and the rate of in- and outmigration. The combined effect of these three forces suggests widely different state/region pathways. Some states/regions are expected to grow at a fast pace. Others will see a slight decline in their populations. Three states/regions are expected to grow by more than 30 per cent between 2015 and 2030: Yangon, Kayah, and Kachin. At the other extreme, Mon, Magway and Ayeyawady may see small falls in the number of inhabitants, partly due to outmigration.

These likely shifts in the regional distribution of population have implications for the decentralization agenda. In particular, transfers of funds from the central to regional and state authorities will need to adjust to changing population sizes. Similarly, provision of education and health services will be affected.

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