

2026 projections exercise: How can recent demographic trends inform the choice of assumptions?

Nathalie Blanpain, Chloé Pariset, Jeanne Pointet, H  l  ne Th  lot (INSEE)

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“Could the growth of the French population reverse? When and under what conditions?” Here are a few examples of questions that INSEE’s population projections help to answer. A projection is not the same as a forecast or a prediction: population projections do not aim to tell us what the future will be, but rather to observe the consequences on the size and structure of the population of possible changes in the three components of demographic dynamics: fertility, mortality and migration. They thus tell us what the population of France will look like in the future, subject to the assumptions we can reasonably make today about future demographic behaviour. The projections do not say: “This is what will happen”, but answer the seemingly simple question: “What would become of the population of France if the behaviour observed today were to evolve in such and such a way?”. By providing a coherent analytical framework for exploring different possible futures, based on clearly stated assumptions, they help us understand demographic mechanisms and shed light, for example, on the lasting and cumulative effect of a decline in fertility or the role of migration. They also highlight the conditions under which certain demographic trends may occur. In some cases, even though the projections are not intended to be predictions, they can highlight trends that appear consistent across different exercises and regardless of the scenarios examined, such as the fact that France’s population will age.

This document reviews recent trends in fertility, mortality and migration, which have guided the choice of assumptions for the 2026 projection exercise (see the post “Updating population projections for France to 2070: which assumptions to use?” from April 2026 on the INSEE [blog](#), in french only).

TABLE OF CONTENTS

1) RECENT DEMOGRAPHIC TRENDS IN FERTILITY	2
2) RECENT DEMOGRAPHIC TRENDS IN MORTALITY	8
3) RECENT DEMOGRAPHIC TRENDS IN NET MIGRATION	12

1) RECENT DEMOGRAPHIC TRENDS IN FERTILITY

For fertility, the plan is to use the same method as that used by INSEE for its 2021 projections, namely:

- Based on recent trends and expert feedback, set a target average age at childbirth and a target total fertility rate (TFR), and the dates on which these targets are reached;
 - Using the same method as for the 2021 projections¹, derive fertility rates by age. These fertility rates are then applied to the number of women by age for each year of the projection in order to determine the number of births.
- ➔ The objective is therefore to determine targets for the TFR and the average age at childbirth.

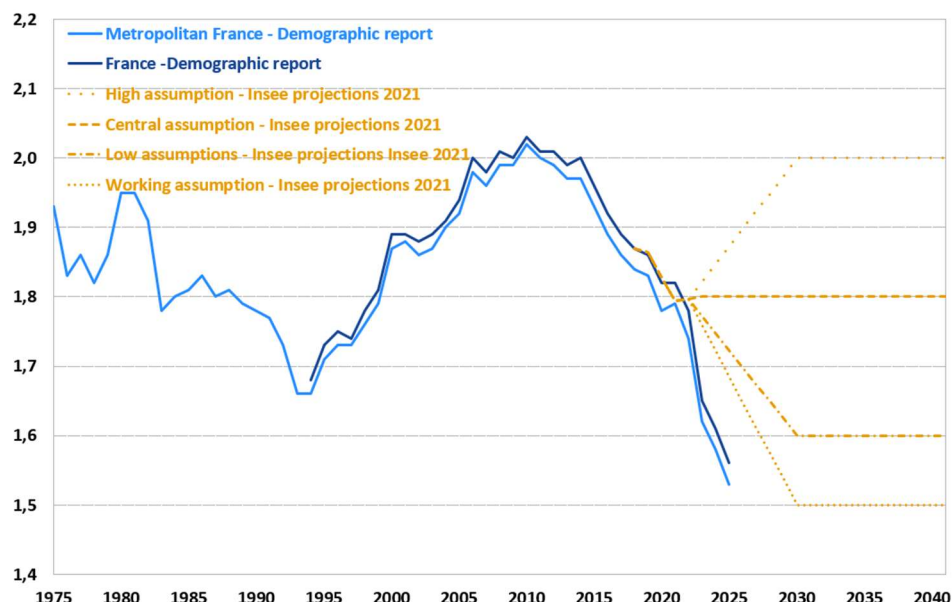
A. FERTILITY INDICATORS

The total fertility rate (TFR) in France remained stable at around 2 children per woman between 2006 and 2014 (Figure 1.1), then declined to 1.56 in 2025.

The INSEE's 2021 population projections used an TFR of 1.8 children per woman for the baseline scenario. Two alternative scenarios of high and low fertility were used, at +/-0.2 from this baseline scenario: 2.0 and 1.6. A working assumption (convergence towards the European level) explored the assumption of fertility at 1.5 children per woman. Convergence towards the target values was assumed to be achieved by 2023 for the baseline scenario and by 2030 for the others.

In view of recent fertility trends, the central assumption of the 2021 projections is therefore high. In 2025, the TFR (1.56) is even lower than the low scenario of the projections (1.6). Its decline has also been faster than assumed in the low and working scenarios.

Figure 1.1 - Change in the total fertility rate



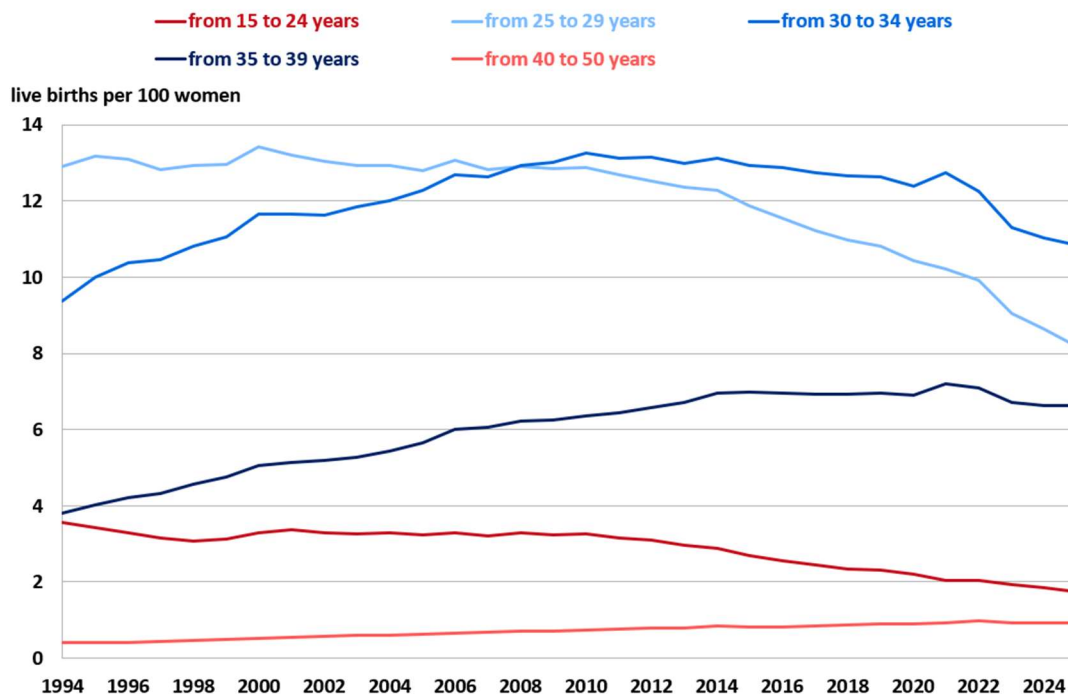
Field: France excluding Mayotte until 2013 and France from 2014 onwards.

Sources: INSEE, 2021 population projections; population estimates and vital statistics.

¹ This is the Schmertmann (2003) model: in this model, the fertility rate profile is obtained from calibrated splines, based on four parameters: the age at which the fertility rate becomes positive, the age at which fertility peaks, the fertility rate reached at that age, and the age at which the fertility rate reaches half its maximum value.

In recent years, the fertility rate has been declining for women under the age of 35 (**Figure 1.2**). For women under the age of 30, this decline is part of a trend that began at least in the mid-2000s. For women aged 30 to 34, the decline began later (at the end of the 2010s) and follows years of increase. The fertility rate for women aged 35 and over, which had been rising since the late 1970s, has stopped increasing in recent years.

Figure 1.2 - Changes in fertility rates among women by age group



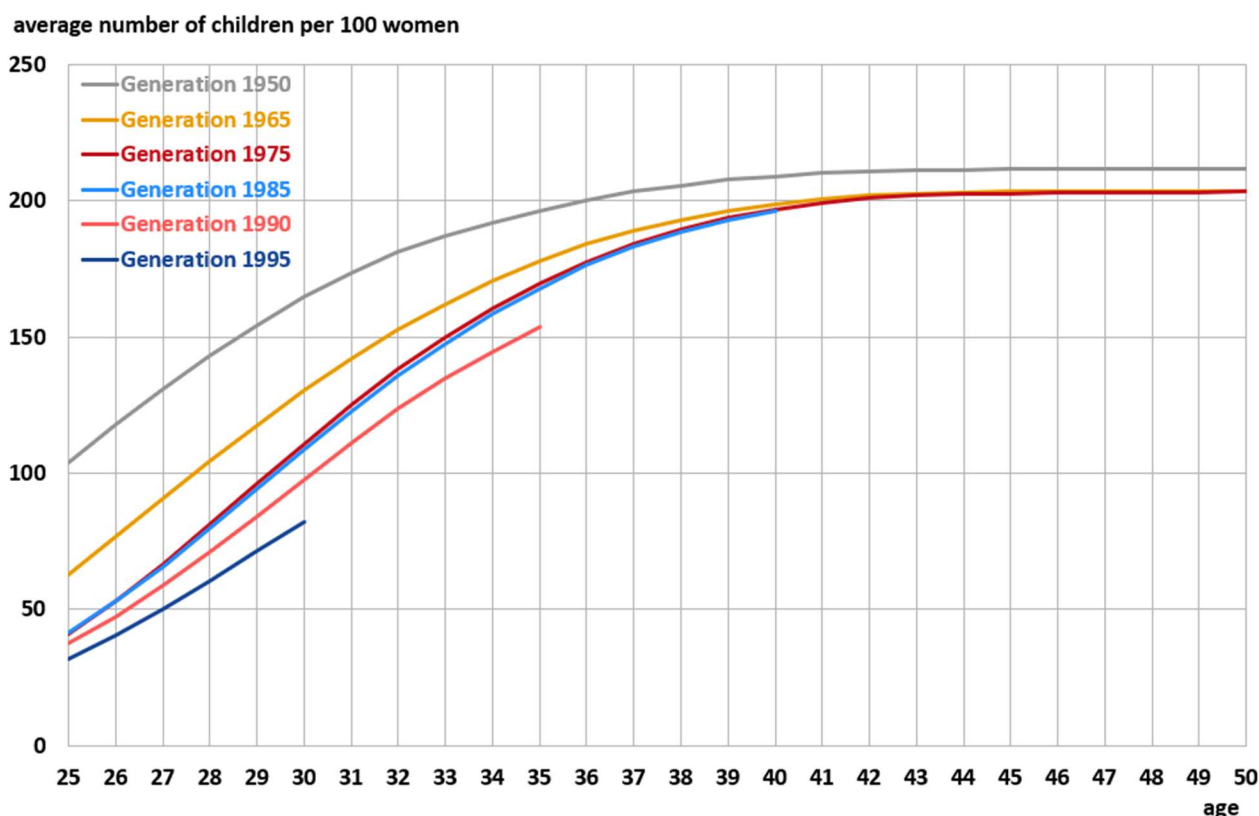
Filed: France excluding Mayotte until 2013 and France from 2014 onwards.

Sources: INSEE, population estimates and vital statistics.

The number of children per woman at age 30 is declining for all generations born after the Second World War (**Figure 1.3**). For the generations born between 1965 and 1985, this mainly reflects the shift in the age of motherhood (*see below*), as their completed fertility reaches or even exceeds 2 children per woman. The question arises for subsequent generations; the decline at age 30 observed for the 1990 and 1995 generations suggests that the "catch-up" effect observed for previous generations may be more compromised.

The Erfi 2 survey, conducted in 2024 by INED, shows that the decline in fertility is likely to continue, as the number of children desired by those under 30 decreased between 2005 and 2024². This decline affects all social groups, but young people more strongly. It is partly due to the way individuals perceive gender roles and the family and view the future, particularly climate change, i.e. factors that are more structural in nature and unlikely to change in the short term.

Figure 1.3 – Average number of children at different ages by generation



Field: Metropolitan France.

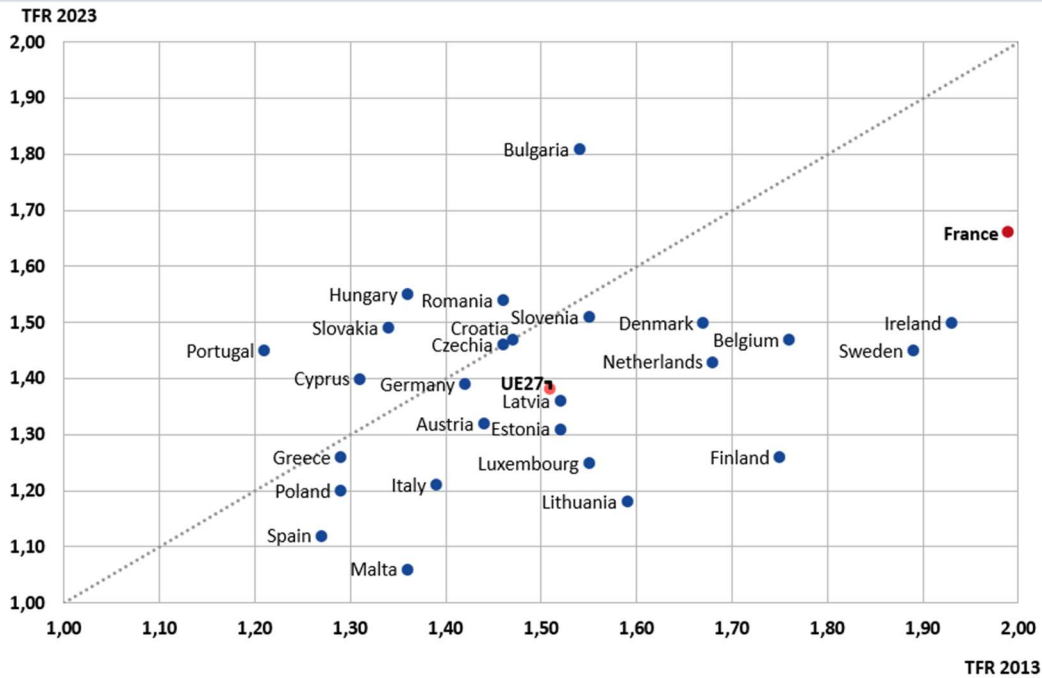
Source: INSEE, population estimates and vital statistics.

Between 2014 and 2024, the TFR fell in all French departments without exception. However, there are regional disparities in terms of fertility. In metropolitan France, in 2024, the TFR will be below 1.4 in nine departments and above 2.0 in two departments (Seine-Saint-Denis and Val d'Oise); in 2014, the lowest TFR was 1.49 and it was above 2.0 in 28 departments.

² Bouchet-Valat M., Toulemon L. (2025), "[People in France want fewer children](#)", Population & Sociétés, no. 635.

Between 2013 and 2023, the TFR fell more in France (-0.34, reaching 1.65 in 2023) than in the European Union (EU) as a whole (-0.13, reaching 1.38 in 2023). However, it remains among the highest in the EU; in 2023, only Bulgaria's TFR (1.81) is higher than France's (1.65) (**Figure 1.4**). Belgium, Ireland, Sweden and Finland have experienced a similar fertility trend to France: in these countries, the TFR increased between the late 1990s and the early 2010s, reaching among the highest levels in the EU in 2013; since then, the TFR has been declining steadily, at a faster rate than in France. In 2023, the TFR reached 1.47 in Belgium, 1.50 in Ireland, 1.45 in Sweden and 1.26 in Finland. In 2024, according to the results of national institutes (not yet published by Eurostat), the TFR appears to be stabilising in these countries, while continuing to decline in France (1.61 in 2024). The question is whether France's TFR, which has fallen less sharply than in countries with similar fertility patterns, will continue to decline, and if so, to what level.

Figure 1.4 – Total fertility rate in the European Union in 2013 and 2023



Note: The dotted line corresponds to a stable TFR between 2013 and 2023.

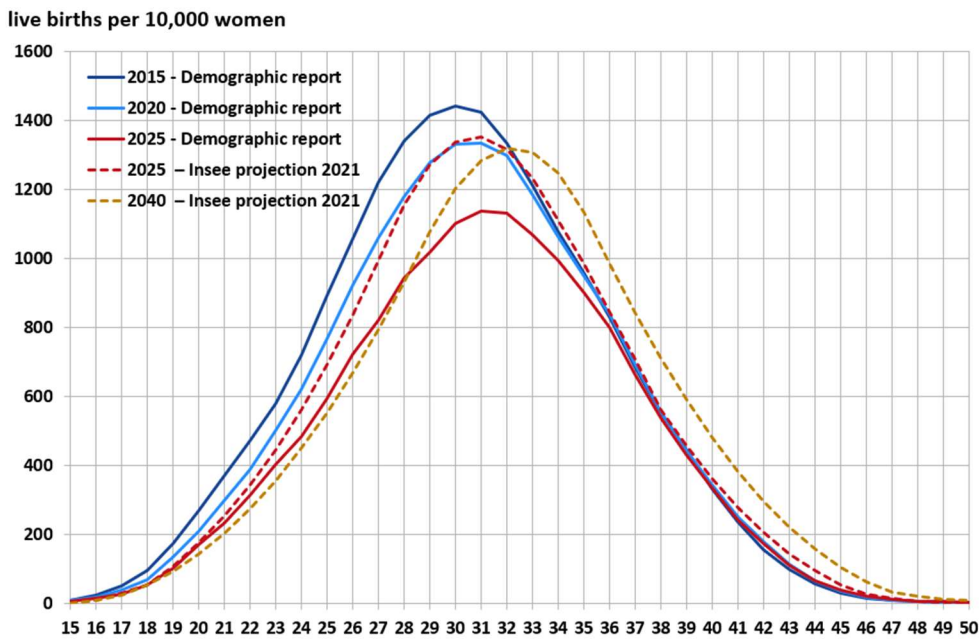
Field: European Union of 27 countries.

Sources: INSEE, population estimates and vital statistics for France. Eurostat for other countries.

B. AVERAGE AGE AT CHILDBIRTH

In 2025, women will have their first child, regardless of birth order, most often at the age of 31, compared with 30 in 2015 (**Figure 1.5**). Over time, the peak age for motherhood has not only shifted, but has also become less pronounced: the profile of fertility rates by age is changing towards a wider spread of ages of high fertility. Compared to the 2021 projections, fertility rates in 2025 are significantly lower, particularly at ages of high fertility.

Figure 1.5 – Fertility rates by age according to year

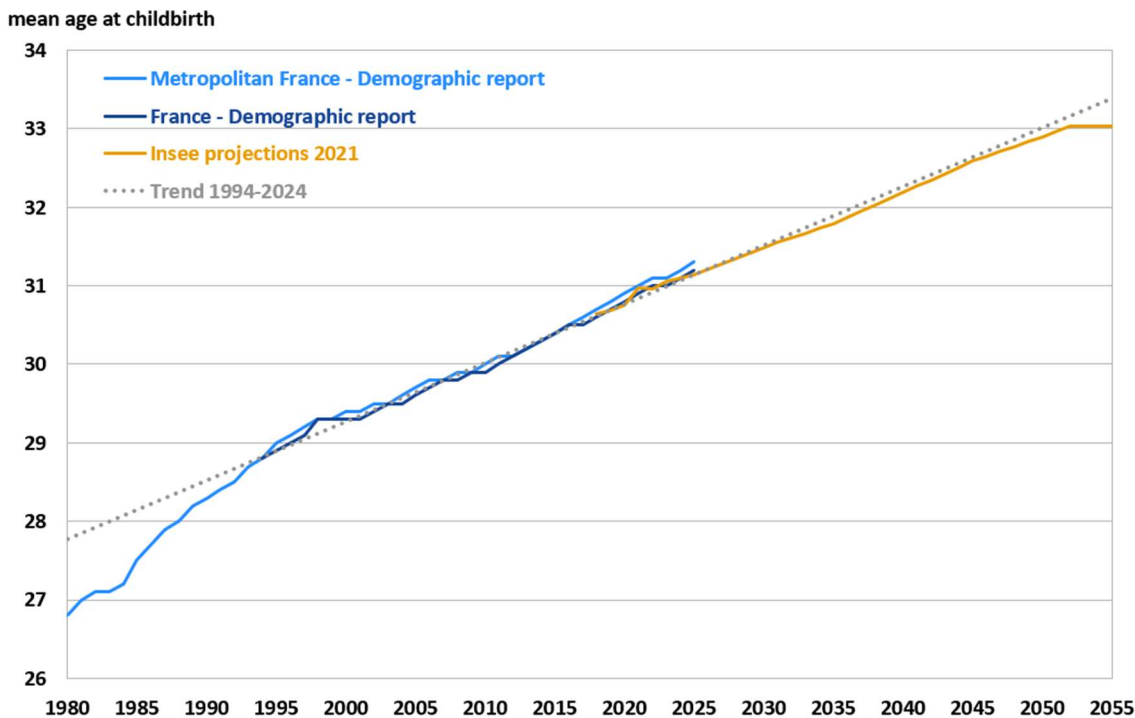


Field: France.

Sources: INSEE, 2021 population projections; population estimates and vital statistics.

Since the late 1970s, the average age at childbirth has continued to rise in France for all birth ranks³. In 2025, it will reach 31.2 years for all ranks combined (**Figure 1.6**), which is close to the 2021 projections (31.1 years in 2025). The 2021 population projections had set a maximum average age of 33, to be reached in 2052. It is proposed to retain this assumption for the 2026 projections (see questionnaire).

Figure 1.6 – Change in the average age at childbirth in France



Field: France excluding Mayotte until 2013 and France from 2014 onwards.

Sources: INSEE, 2021 population projections; population estimates and vital statistics.

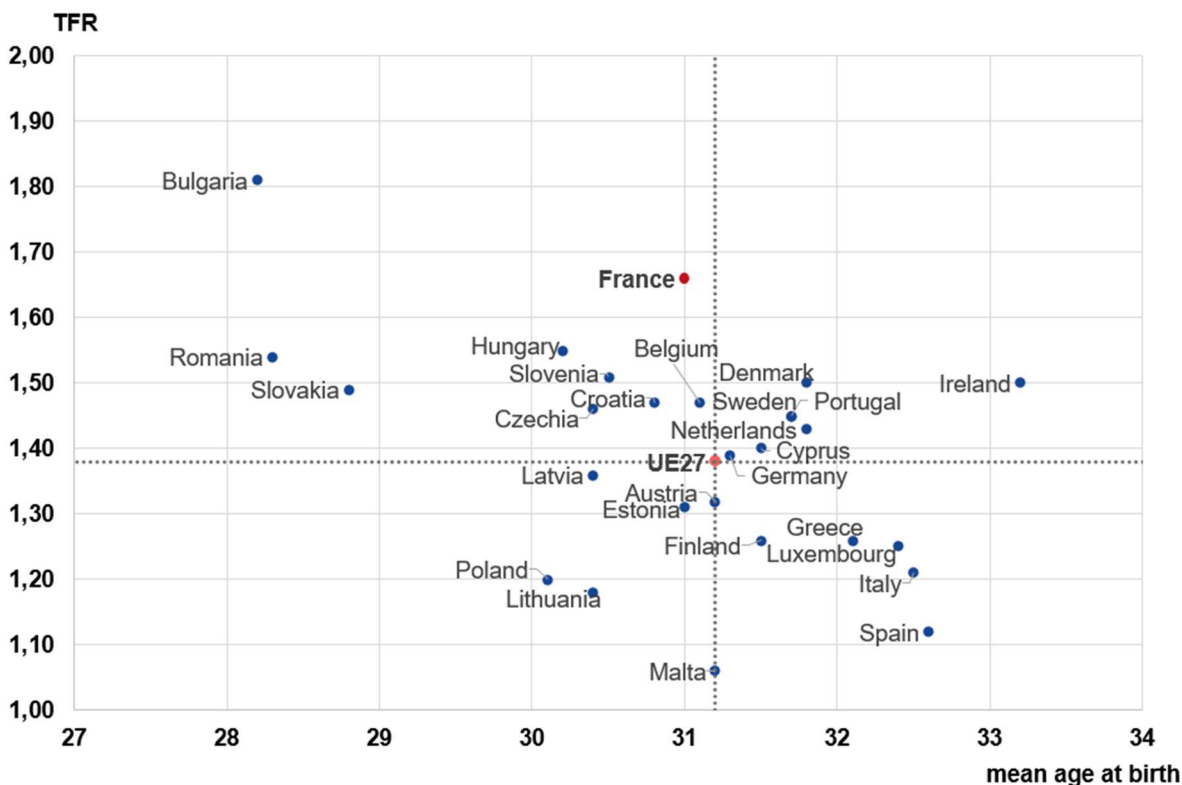
³ Pointet J. (2025), "A first child at 29.1 in 2023: an age still rising", Insee Première no. 356.

Between 2014 and 2024, the average age at childbirth increased in almost all departments. In 2024, it was highest in Paris (34.4 years) and lowest in French Guiana (28.9 years) for France and in the Ardennes (29.1 years) for metropolitan France.

Between 2013 and 2023, the average age at childbirth increased in all EU countries (except Slovakia, where it will remain stable). In 2023, it was 31.2 years across the EU as a whole (compared with 30.3 years in 2013); it was highest in Ireland (33.2 years) and lowest in Bulgaria (28.2 years) (**Figure 1.7**). EU countries with fertility trends similar to those in France (Belgium, Finland, Ireland and Sweden) all had a higher average age at childbirth than the European average, while France's average age (31.0 years in 2023) remained below the EU average.

Whether at the departmental level or at the level of EU countries⁴, there does not appear to be any obvious link between fertility intensity and the average age at childbirth (**Figure 1.7**).

Figure 1.7 – Total fertility rate (TFR) and average age at childbirth in the EU in 2023



Field: European Union of 27 countries.

Sources: INSEE, population estimates and vital statistics for France. Eurostat for other countries.

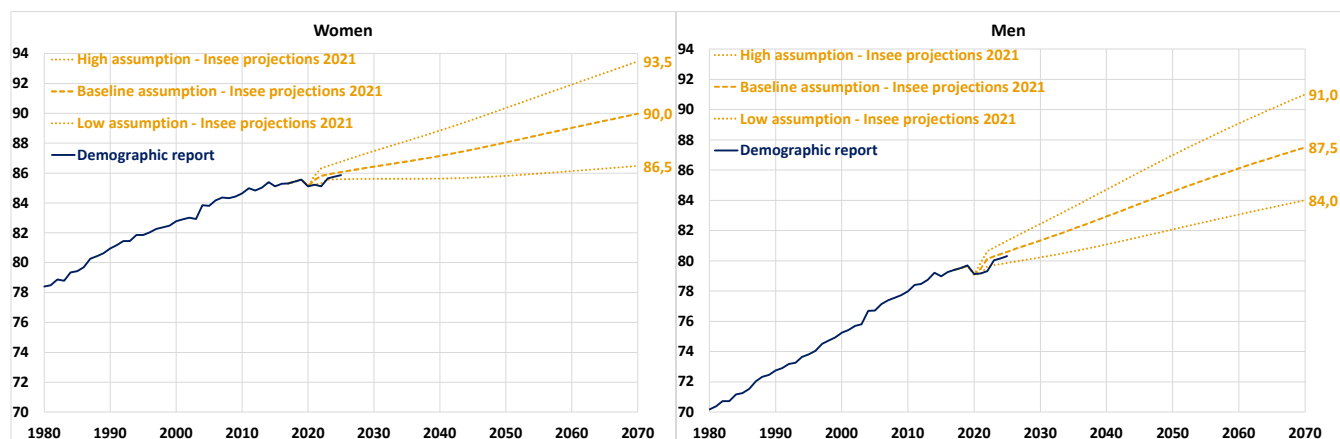
⁴ Thélot H. (2025), "Births in 2024: Births still in sharp decline," Insee Focus no. 357.

2) RECENT DEMOGRAPHIC TRENDS IN MORTALITY

The 2021 projections used a baseline assumption of life expectancy at birth of 90.0 years for women and 87.5 years for men in 2070. Two alternative assumptions for high and low life expectancy were +/-3.5 years from this central assumption. An assumption of constant life expectancy equal to its 2019 level was also made.

The estimated life expectancy in 2025 is between the low and central assumptions for both women and men (figure 2.1).

Figure 2.1 - Change in life expectancy at birth

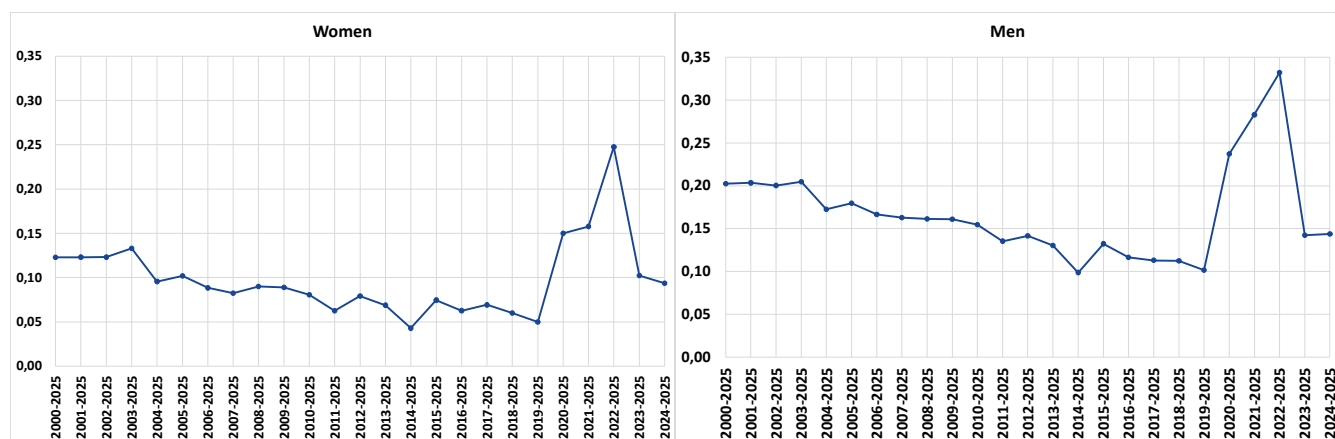


Field: metropolitan France until 1993, France excluding Mayotte from 1994 to 2013, and France from 2014 onwards.

Sources: INSEE, 2021 population projections; population estimates and vital statistics.

For the 2026 projections, mortality rates will be extended, using a model based on a past reference period. Life expectancy gains are becoming smaller as the reference period shortens. Thus, the annual life expectancy gain is halved between the two periods 2000-2025 and 2019-2025 (Figure 2.2). However, the annual gain for the last two years (2023-2024) is higher than in the past. This may be the result of a harvesting effect, following the period 2020-2022, which was marked by high mortality due mainly to the Covid-19 epidemic.

Figure 2.2 – Average annual gain in life expectancy by period, between year N and 2025

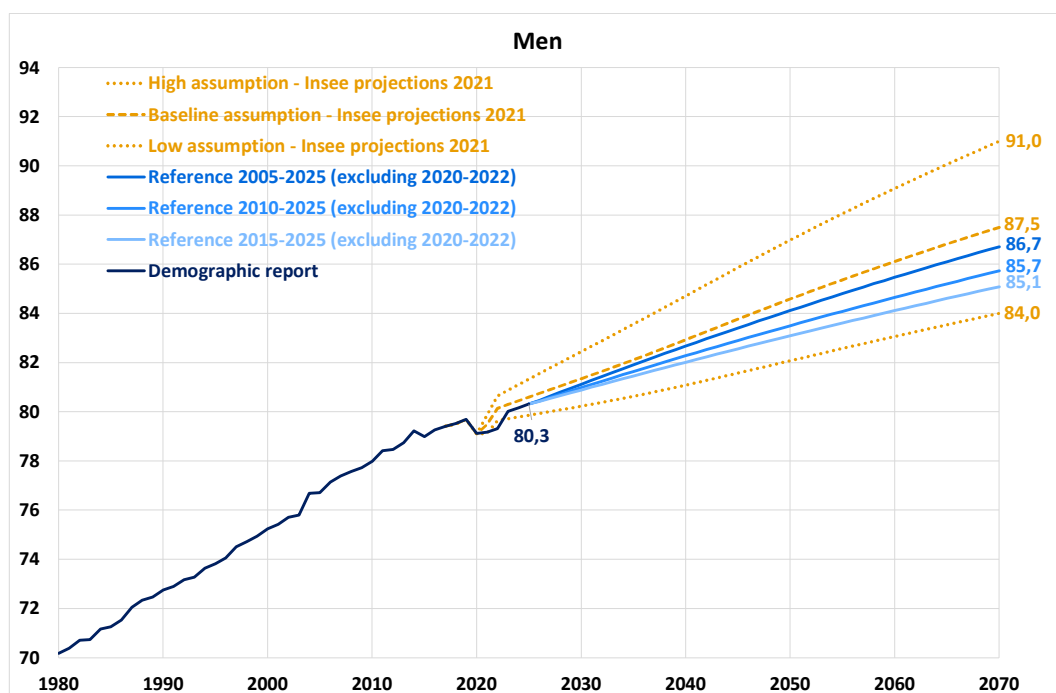
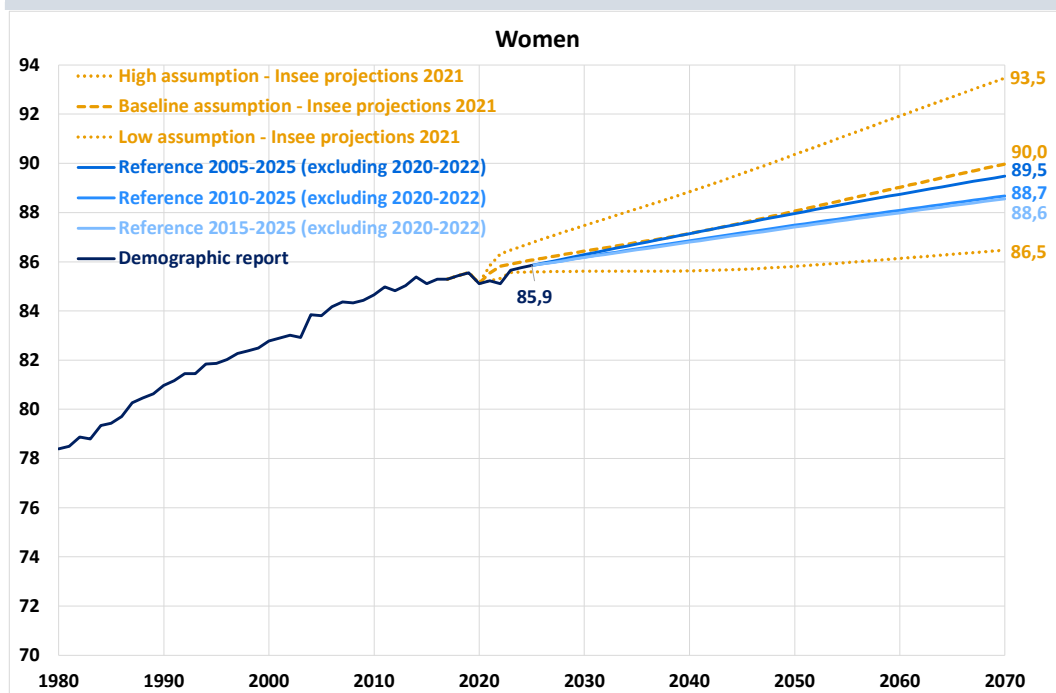


Field: France excluding Mayotte until 2013 and France from 2014 onwards.

Sources: INSEE, population estimates and vital statistics.

Three reference periods can be considered for extending mortality rates: 2005-2025, 2010-2025 and 2015-2025, excluding the years 2020-2022, which were marked by high excess mortality. The periods selected for the model would be identical for women and men. Regardless of the period selected, this would lead to a downward revision of the baseline assumption compared to the latest projections (**Figure 2.3**).

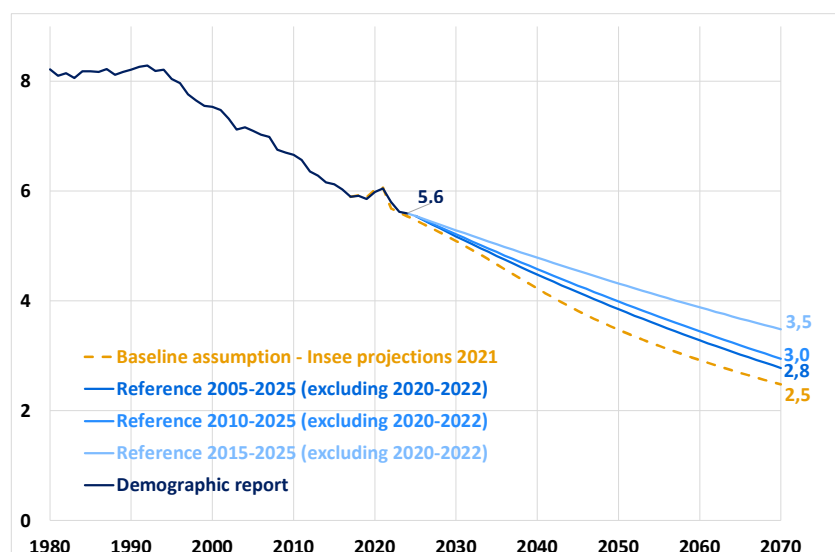
Figure 2.3 – Assumptions for the evolution of life expectancy at birth according to the period selected



Field: metropolitan France until 1993, France excluding Mayotte from 1994 to 2013 and France from 2014 onwards.
Sources: INSEE, 2021 population projections; population estimates and vital statistics.

Regardless of the reference period used, this would lead to an upward revision of the gap in life expectancy at birth between women and men (**Figure 2.4**).

Figure 2.4 – Gap in life expectancy at birth between men and women according to the period selected



Field: Metropolitan France until 1993, France excluding Mayotte from 1994 to 2013 and France from 2014 onwards.

Sources: INSEE, 2021 population projections; population estimates and vital statistics.

Depending on the period considered, life expectancy gains between 2025 and 2070 are expected to range from +2.7 years to +3.6 years for women and from +4.8 years to +6.4 years for men (**Figure 2.5**).

Figure 2.5 – Increase in life expectancy at birth according to the period considered

Reference period	Women			Men			W-M gap in 2070
	Estimated in 2025	Projected in 2070	Increase 2025-2070	Estimated in 2025	Projected in 2070	Increase 2025-2070	
2005-2025	85.9 years	89.5 years	+ 3.6 years	80.3 years	86.7 years	+ 6.4 years	+ 2.8 years
2010-2025		88.7 years	+ 2.8 years		85.7 years	+ 5.4 years	+ 3.0 years
2015-2025		88.6 years	+ 2.7 years		85.1 years	+ 4.8 years	+ 3.5 years

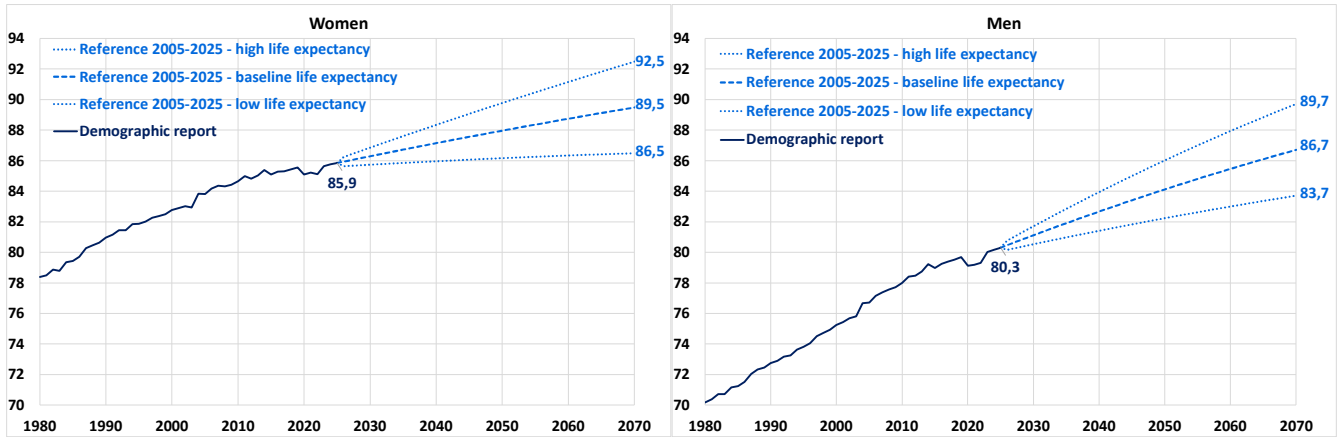
The low and high assumptions in the latest projections differed by +/-3.5 years from the baseline assumption. If these differences remain unchanged, life expectancy for women would be significantly lower than its current level in the low scenario. This difference could be reduced to +/-3.0 years, so that life expectancy for women in 2070 in the low scenario would remain close to its 2025 level. Nevertheless, women's life expectancy in 2070 under the low scenario would be slightly lower than its current level for both the 2010-2025 and 2015-2025 periods (-0.2 years and -0.3 years, **Figure 2.6**).

Figure 2.6 – Baseline, low and high assumptions for life expectancy at birth

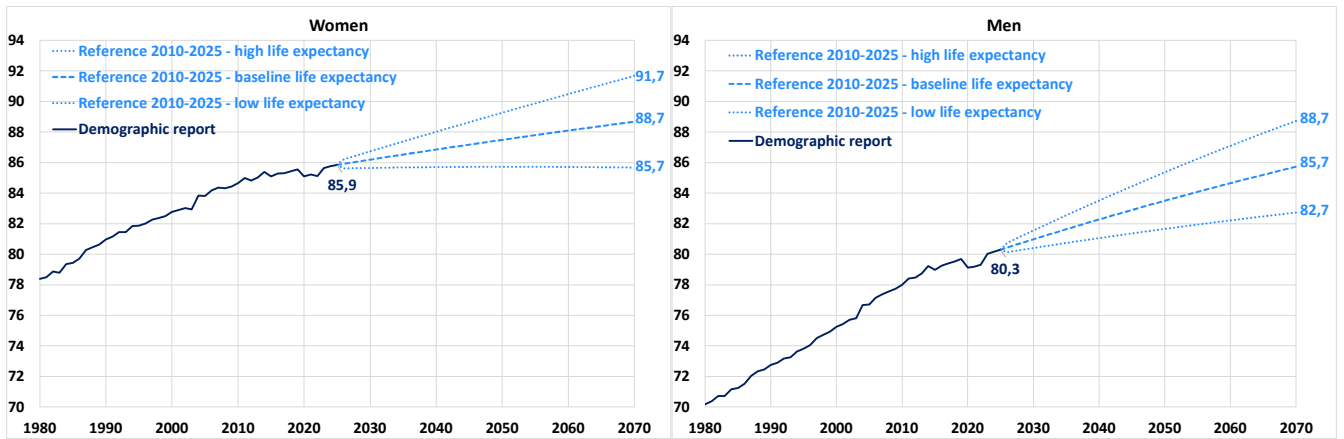
Reference period	Women				Men			
	Estimated in 2025	Low in 2070	Medium in 2070	High in 2070	Estimated in 2025	Low in 2070	Medium in 2070	High in 2070
2005-2025	85.9 years	86.5 years	89.5 years	92.5	80.3 years	83.7 years	86.7 years	89.7 years
2010-2025		85.7 years	88.7 years	91.7 years		82.7 years	85.7 years	88.7 years
2015-2025		85.6 years	88.6 years	91.6 years		82.1 years	85.1 years	88.1 years

Figure 2.7 – Life expectancy according to the baseline, low and high assumptions considered

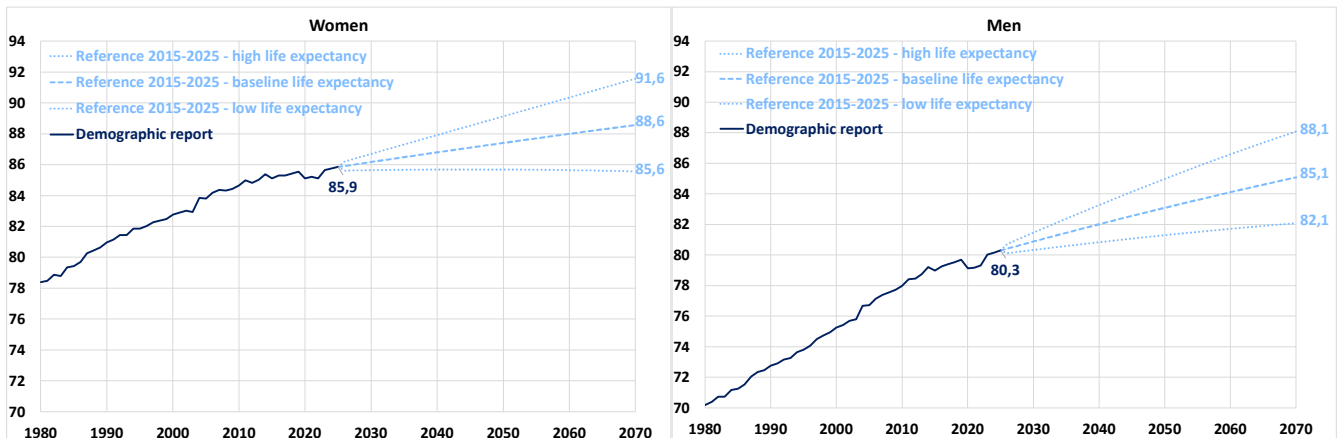
Reference 2005-2025



Reference 2010-2025



Reference 2015-2025



3) RECENT DEMOGRAPHIC TRENDS IN NET MIGRATION

A. MEASURING AND INTERPRETING NET MIGRATION

Net migration is, alongside natural growth, the other component of population change. Its evolution can sometimes be difficult to comment on in the past, and it is particularly tricky to make assumptions about the future. Net migration is determined by changes in the number of people entering and leaving the country, which differ depending on whether they were born in France or abroad. However, only entries into the country can be directly observed through the population census. Net migration is not observed; it is deduced from population trends based on population censuses and natural growth. Its measurement is therefore subject to greater uncertainty and has been made particularly complex in recent years due to changes in the collection of population census data and exceptional demographic shocks, which are smoothed out using the population census methodology based on five annual census surveys (see methodological note on statistical adjustments to make population measurements in censuses comparable).

Exceptional demographic events, beyond the way they are taken into account in the population census, have had an impact on migration flows in recent years, whether it be the health crisis or the war in Ukraine, making it difficult to extrapolate recent trends into the future. Finally, the latest population census, the initial results of which were released at the end of 2025, provides data on the population as of January 1 2023 and, consequently, the latest known net migration figure is that for 2022. This figure is particularly high, at 271,000: excluding the impact of the war in Ukraine, it is around 200,000.

B. CHANGES IN NET MIGRATION AND THEIR RELATIONSHIP TO CHANGES IN MIGRATION FLOWS BY GEOGRAPHICAL ORIGIN

The baseline assumption of the 2021 projections was a positive annual net migration of 70,000 people from 2021 to 2070. The average over the last 5 or 10 years, which includes the period of the health crisis and the year 2022, marked by significant inflows into the territory linked to the resumption of travel and the war in Ukraine, is well above this central assumption (**Figure 3.1**). The net migration observed over the period 2018-2022 is also higher than the upper assumption of 120,000 in the 2021 projections. This is also the case for the period 2013-2022. The exclusion of 2022 slightly reduces the gap between the net migration observed and the 2021 projection assumptions.

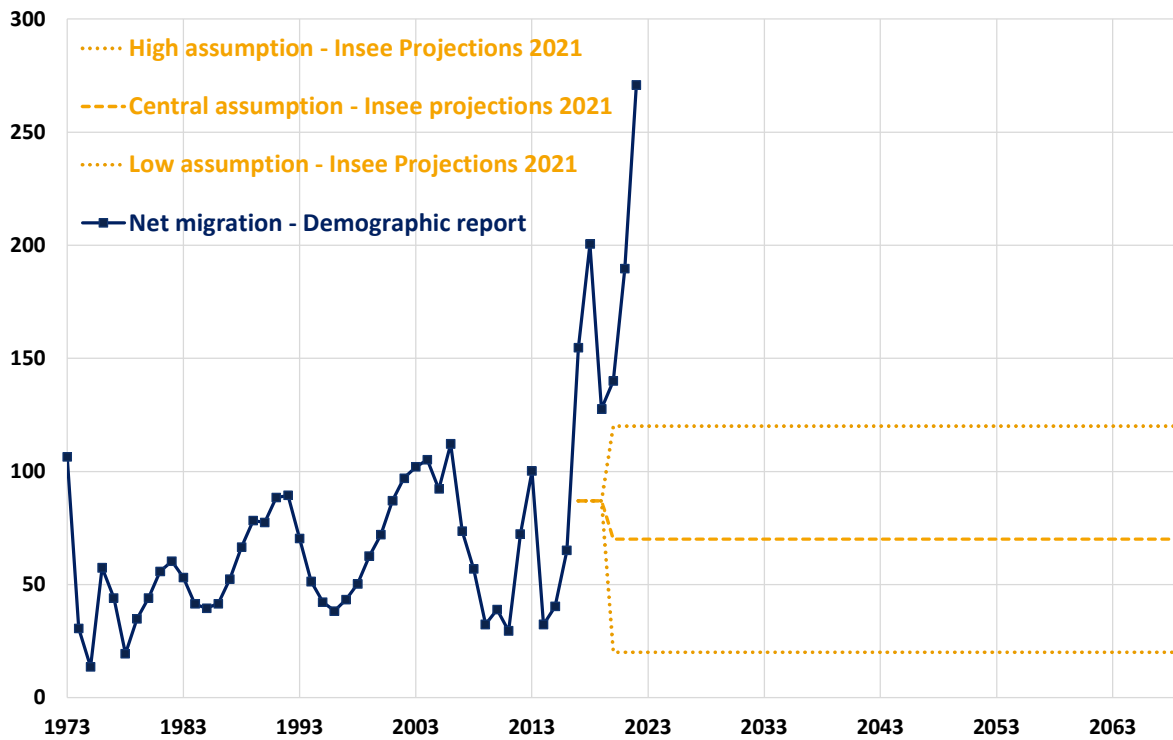
Since 2017, net migration has consistently exceeded 100,000, which contrasts sharply with what has been observed in the past (**Figure 3.2**). Taking all origins together, net migration has increased sharply since 2017, mainly due to fewer departures from the territory of people born in France or of French nationality abroad (see *below*). Over the period 2017-2021, the average annual net migration was +162,000, compared with +56,000 over the period 2011-2016.

Figure 3.1 – Average annual net migration (in thousands) over different periods in the past

		France
Latest known net migration	2022	+ 271
Annual averages by period, including 2022		
5 years	Average 2018-2022	+ 186
10 years	Average 2013-2022	+ 136
15 years	Average 2008-2022	+ 103
20 years	Average 2003-2022	+ 102
25 years	Average 1998-2022	+ 96
Annual averages by period, including 2022 excluding the impact of the war in Ukraine		
5 years	Average 2018-2022	+ 172
10 years	Average 2013-2022	+ 125
15 years	Average 2008-2022	+ 99
20 years	Average 2003-2022	+ 98
25 years	Average 1998-2022	+ 89
Annual averages by period, not including 2022		
5 years	Average 2017-2021	+ 162
10 years	Average 2012-2021	+ 112
15 years	Average 2007-2021	+ 90
20 years	Average 2002-2021	+ 93
25 years	Average 1997-2021	+ 89

*: France excluding Mayotte until 2013 and France from 2014 onwards
Sources: INSEE, population estimates and vital statistics.

Figure 3.2 - Change in annual net migration (in thousands)



Note: in the 2021 projection exercise, the points from 2018 to 2021 were not known and were provisionally estimated by convention as the average of the last three net migration balances observed, from 2015 to 2017.

Field: Metropolitan France until 1981, excluding Mayotte until 2013 and France from 2014 onwards.

Sources: INSEE, 2021 population projections; population estimates and vital statistics.

Although the net migration balance is not broken down into immigrants⁵ and non-immigrants in the projections, INSEE has published annual figures for entries and exits since 2006, distinguishing between these two categories of population: immigrants and non-immigrants.

- Immigrant entries have been on an upward trend since 2006 (**Figure 3.3**); they fell sharply in 2020, but have been gradually rising since then, driven by the resumption of post-COVID migration plans and the war in Ukraine in 2022.
- Non-immigrant entries, on the other hand, have remained relatively stable.

Non-immigrant exits are volatile. They have declined in recent years, reaching 74,000 in 2021 (latest known figure; the breakdown of the latest migration balance for 2022 by geographical origin has not yet been completed). In 2021, the net migration of non-immigrants was positive for the first time since the annual series began (**Figure 3.4**).

Figure 3.3 – Entries and exits (in thousands) for immigrants and non-immigrants

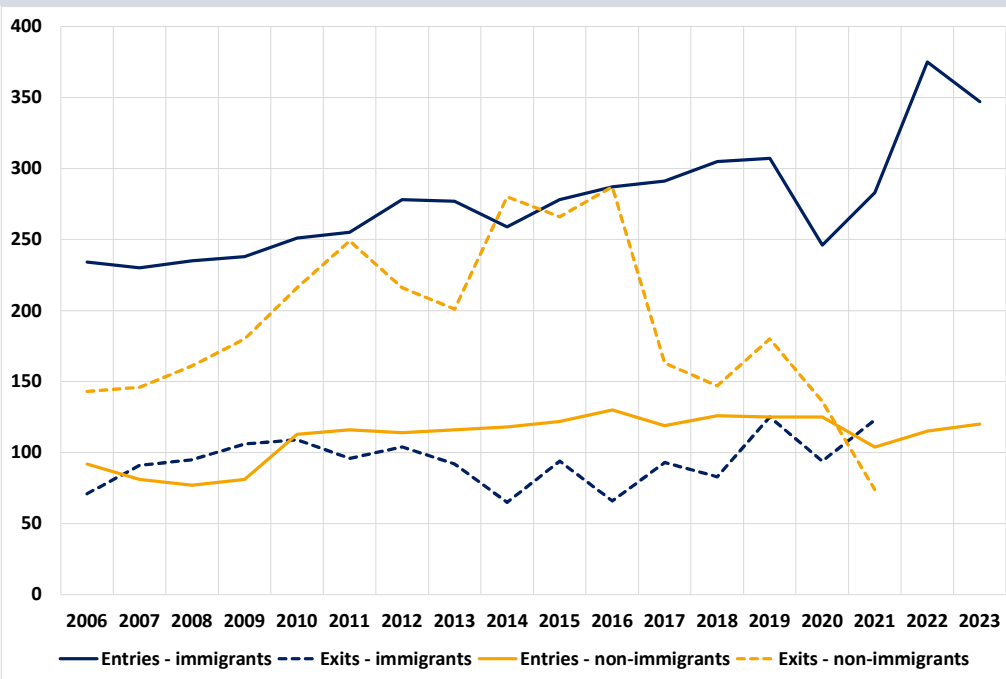
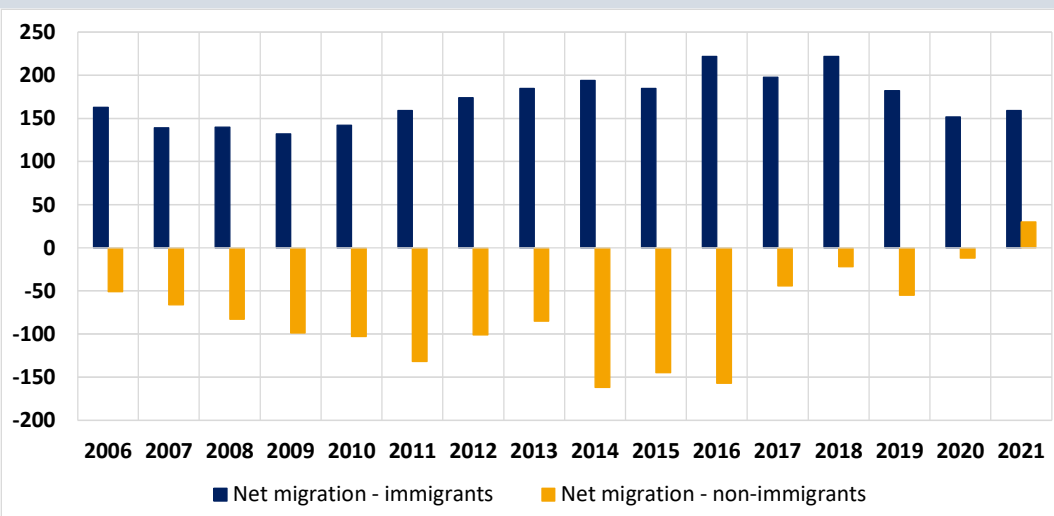


Figure 3.4 – Net migration of immigrants and non-immigrants (in thousands)



Field: France excluding Mayotte until 2013, France from 2014 onwards
 Source: INSEE, estimates of population, inflows and outflows.

⁵ An immigrant is a person born abroad, of foreign nationality at birth, and residing in France.

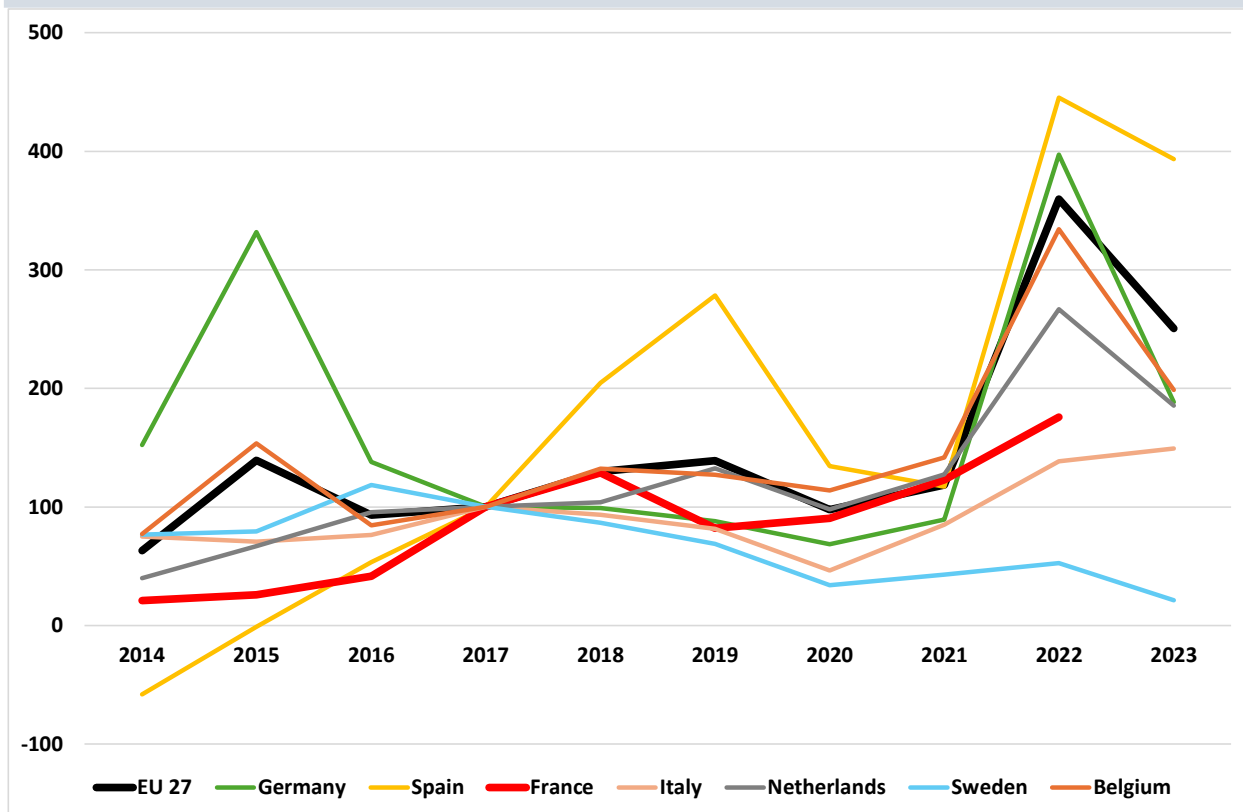
Such changes are difficult to predict and even analyse, with the exception of inflows, which are directly measured and for which data is available on the characteristics of people entering the country (see INSEE Première No. 2050 and INSEE Première No. 2051). As outflows are not observed, only the net migration balance is projected.

Under these conditions, devising scenarios for projecting the level of net migration is a daunting task. This new projection exercise comes at a time when the natural balance has become negative in France and, as a result, net migration is the only contributor to population growth.

As in previous projection exercises, this net migration is assumed to be constant each year. Should we assume a baseline scenario of 120,000 (close to the average observed over the last 10 years, except for the exceptional point in 2022, and equal to the high assumption for 2021)? Or should we assume a higher level, closer to the average for the last five years (again, excluding 2022), i.e. 150,000 for a round figure (which is more than double the central assumption for the 2021 exercise)? And for the low and high variants, should we always consider deviations from the central assumption of +/- 50,000?

Since 2017, the change in net migration in France has been close to the European average (Figure 3.5). In several countries, net migration increased sharply in 2022, before declining in 2023.

Figure 3.5 – Net inflows minus outflows (*) in selected European countries (index base 100 in 2017)



Source: Eurostat, extracted on 15/01/2026; France's net migration for 2022 taken from the latest demographic report.

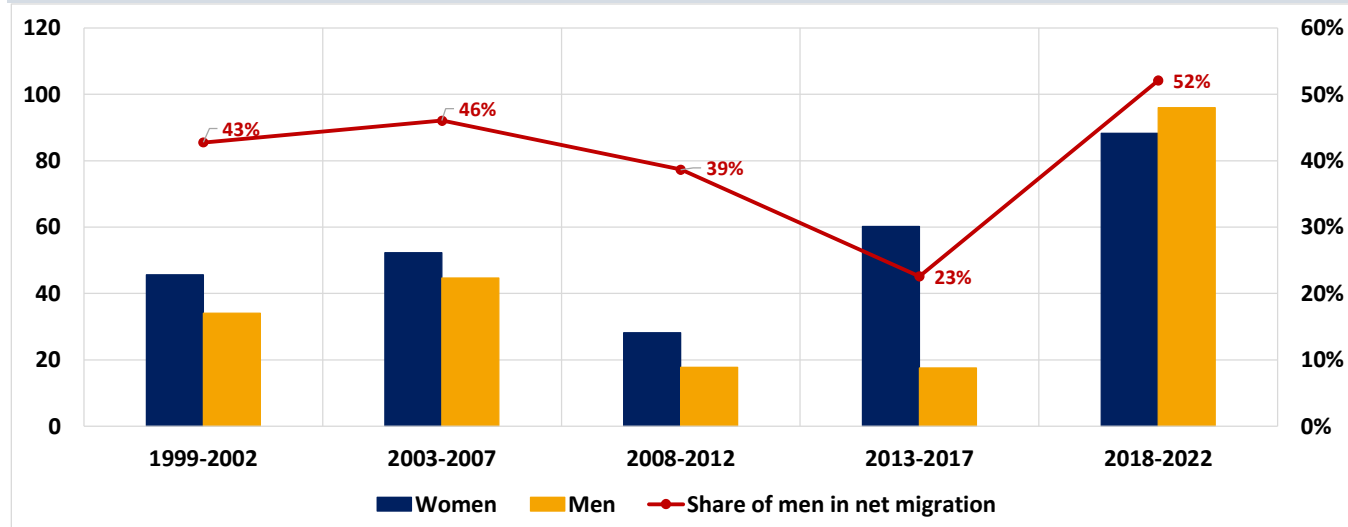
(*) This is therefore the net migration, estimated on the basis of entries and exits reported by countries.

As the projections are based solely on assumptions about the level of net migration from all sources, without breaking down the flows, this section describes the composition of net migration by gender and age, which is a parameter of the projection. This parameter is important because the distribution of net migration by gender and age has consequences for the projection of the number of people of working age and the number of women of childbearing age.

While the period 2013-2017 was characterised by an exceptionally low proportion of men in the net migration balance (23% on average), the recent period (2018-2022) is characterised by a more balanced gender profile (52% men, **Figure 3.6**).

In the 2021 projection exercise, the gender imbalance led to a projected net migration balance of two-thirds women and one-third men. The new 2026 exercise will undoubtedly have to adopt a more balanced assumption, especially since we know that the gender profile of arrivals in the country is balanced, with women accounting for just over half of arrivals in recent years (*see INSEE Première No. 2051*).

Figure 3.6 – Net migration by gender (in thousands) and share of men in the overall balance (in %, right-hand scale)



Field: France excluding Mayotte until 2013, France from 2014 onwards.

Source: INSEE, population estimates and vital statistics.

Net migration among 18-24 year olds is negative, with a significant gap between women and men (**Figure 3.7**). This negative net migration can be explained in particular by higher numbers leaving, especially at ages corresponding to the start of studies or entry into the labour market. For the 25-29 age group, and even more so for the 30-44 age group, the balance is positive and the gap between women and men is widening. This does not mean that arrivals occur overwhelmingly between the ages of 30 and 44 (they occur mostly at younger ages), but rather that there are comparatively few departures at these ages.

Figure 3.7 – Net migration by gender and age group (average for 2014-2022, in thousands)

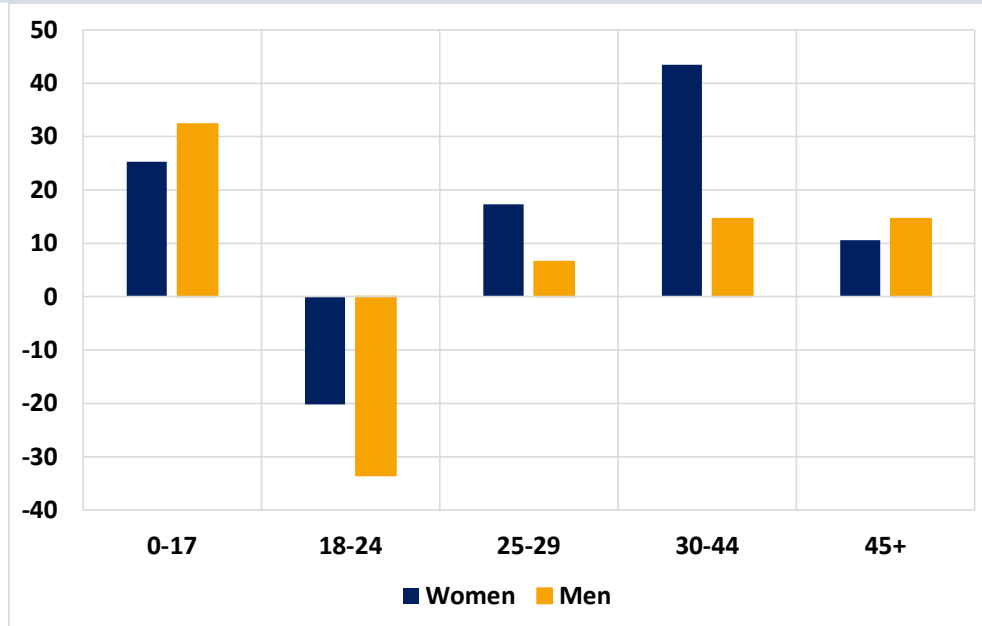
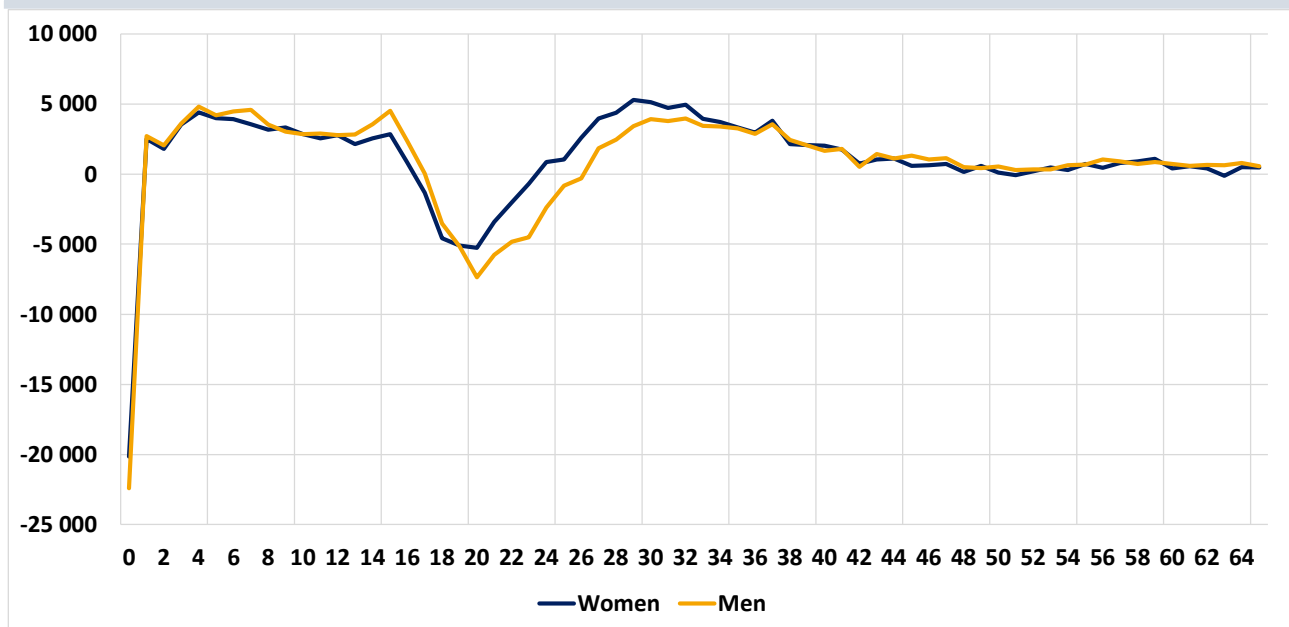


Figure 3.8 – Net migration by gender and age (average for 2014-2022)



Field: France

Source: INSEE, population estimates and vital statistics.

The age distribution of the projected net migration is based on the average age distribution of this balance in the past. The breakdown of net migration by age shows a negative net migration for newborns, which may be due to an underestimation of the number of young children in the population census. Comparisons between the number of young children in the population census and the number of births registered in France suggest possible omissions in the census (Solard, 2020), particularly for newborns, but also, more generally, for young children, resulting in a strongly negative net migration between 0 and 1 year of age (Figure 3.8.). In the 2021 projection exercise, the net migration rate was corrected for young ages by distributing the deficit measured for children under 1 year old across the 0-8 age group. The question arises as to whether this correction should be retained.