

Peter Zeihan

The End of the World is Just the Beginning: Mapping the Collapse of Globalization

Harper Business, New York, 2022, p. 512

Kraj sveta je samo početak: mapiranje kolapsa globalizacije

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1 THE BOOK

Last year, Peter Zeihan's book *The End of the World Is Just the Beginning: Mapping the Collapse of Globalization* became a bestseller, reaching 10th place on The New York Times (2022) non-fiction best-seller list. Zeihan's public appearances in the mass media and on podcasts (Rogan 2023) ensured that his arguments reached even more people. This reach was reminiscent of Paul Ehrlich's (1971) *Population Bomb*, in that the demographic argument was a central global issue at the time.

The book speaks to a general audience and does not claim to be a scientific monograph. Despite Zeihan's background as a demographer, the book doesn't solely focus on demography, but instead covers a wide range of topics including geography, geopolitics, resource management, and economics. The core thesis of the book revolves around the issues of population aging and food

and energy production, which are reminiscent of two separate debates that have been present in the demography discourse since its inception as a field.

The main thesis of the book is that many developed countries are facing population aging, which poses a significant challenge, as a shrinking workforce must support a larger, older population. While this demographic trend is not new, what makes Zeihan's book controversial is that he also postulates the end of the globalised economy. He predicts what the world will look like if global trade is disrupted and all countries need to become more or less autarkic. In this world, some countries have advantages over others. The countries in the best position are those with desirable demographics and, even more importantly, geography. Zeihan considers transport, finance, energy, resources, and manufacturing capacities in his analysis. He writes in some detail about how fertiliser production is distributed around the world,

and how even the slightest disruptions in the fertiliser industry could lead to potential famines. He uses the example of potassium-based fertiliser production, which is concentrated in very few countries (Jordan, Israel, Germany, Russia, Belarus, and Canada). Creating new production capacities in this field would require at least a decade. Given that some countries are completely dependent on such fertilisers, this would create huge vulnerabilities were we to see a collapse in global trade. Zeihan makes country-specific predictions of how this future would look. The resulting world (that presupposes the withdrawal of the only superpower) would be riddled with conflicts. The biggest loser in this new world would be China (which is mentioned 327 times in this 512-page book) with its unfavourable demographics, geography, and lack of endogenous energy and fertiliser inputs.

Zeihan argues that USA is one of the few countries that can get through the upcoming upheaval unscathed. According to him, the USA has better fertility levels than most other developed countries and is largely self-reliant when it comes to food and energy production. He contrasts that with China, which has had much lower fertility rates for some time and is completely reliant on imports for energy and, more importantly, food.

At the end of the book, Zeihan considers the effects of climate change on food production, specifically the challenges that will be faced in the places that produce most of the world's food.

Zeihan is sceptical towards the green transition, as it requires an order of magnitude more materials than the world is currently manufacturing to produce clean energy, such as wind turbines, solar power plants, electric vehicles, and batteries.

The book was published at an opportune time (right after the beginning of the Russian invasion of Ukraine in 2022) to support Zeihan's arguments, as both Ukraine and Russia are big producers of food and, maybe even more importantly, fertiliser. At some points in 2022, the disruption of the global food trade did indeed seem catastrophic.

2 THE CRITICISM

Zeihan's outlook is largely fatalistic. From a demographic perspective, his fatalism may be well placed; there is little countries can do to address the decades-long demographic challenges they're still facing. In other words, even if all the countries where fertility has been low suddenly experience an increase in fertility, the generations of young people who would express such increases in fertility are so small that the net effect of such an increase would be negligible. Increased immigration could help, but if the scenario Zeihan predicts happens even in part, the consequences would make the affected countries undesirable for migration. In his future, immigrants would flock to the US.

It is difficult to tell how likely the Zeihan scenario is. Pessimistic predictions so far have typically been wrong, but that tells us nothing about future predictions. From a demographic perspective, it is easy to project future outcomes, as the number of components is limited, but projecting the future in terms of geopolitics is simply impossible. In the author's own words: "Geography does not change, demographics do not lie". However, these two components are simply not enough to predict the geopolitical future with any kind of certainty.

Zeihan's main contribution to the debate is that he provides us with one

potential scenario. However unlikely it is, we should be aware of such a grim possibility for the future. What's more, some of the points Zeihan makes are important no matter whether he is right or wrong about the future. Food security and the pain points of our global food production and distribution system are not issues that the general or even scientific audience is very familiar with. The disruptions in logistics chains and production that we saw during the COVID-19 pandemic, the Suez Canal blockage of 2022, and the Russian invasion of Ukraine have made it evident that global supply chains are vulnerable.

The author insists that the things he writes about are not a matter of projecting the future, but rather that he is telling the readership *what will happen*. This is simply too strong an assertion as there are many unpredictable changes that can happen *than are dreamt of in his philosophy*. The author insists that his geopolitical predictions are grounded in a rich history of geopolitical precedents, but history is riddled with unforeseen events and technological and societal changes, many of which have made a mockery of previous predictions. For example, Zeihan could not have predicted the recent advances made in artificial intelligence and how they would impact not only the next decades, but also the years and even months following the publication of his book¹.

The author also ignores the potential for increased longevity and general increases in productivity. Health and longevity effects could be more significant for welfare than nominal GDP, which may decline as populations age and fall.

¹ To be fair, the author addressed the advances made in AI in the public domain after the publication of his book in a way that fits into the general narrative outlined in the book (which is also telling).

GDP per capita may not decline similarly, as Miles (2023) argues.

Zeihan's book is very US-centric. In it, the US is the main protagonist, with its desirable geography, resources, and population age structure. This is understandable, as the author is from the USA and he seems to be writing to a US audience.

3 CASSANDRAS VS POLLYANNAS

Malthus's (1798) essay was the first such demographic argument in which he postulated that the growth of the population greatly exceeds the growth of its capacities to produce food, leading to the obvious conclusion that this is not sustainable. This view was later reflected by other similar arguments that were called neo-Malthusian, as they espoused the same principle, mainly focusing on the carrying capacity of the earth and centring around other necessary resources. While the classical Malthusian position refers to population and food, neo-Malthusianism is a concern that overpopulation will lead to overconsumption, which will increase resource depletion and/or environmental degradation, leading to ecological collapse or other disasters.

Today, the question of the future and arguments around Malthusian ideas are as relevant as ever. Many developed and developing countries are facing a fertility crisis, and pronatalism today means something completely different than it did 50 years ago. Today, the debate has more dimensions and has evolved significantly beyond the Malthusian and neo-Malthusian arguments. When it comes to debates around the future involving demographics, there are usually two important questions: will the future be favourable, and for the

optimal future outcome, is it better for people to have more children or fewer? Depending on the answers to these two questions, we can describe a position using a two-by-two matrix (Table 1).

Table 1. Different perspectives on future and population

	Pronatalist	Antinatalist
Optimists	Longermists	Post-Malthusians
Pessimists	Peter Zeihan	Malthusians Neo-Malthusians

Malthusians and neo-Malthusians are clear examples of antinatalists with a pessimistic outlook. Defining the other three positions in this matrix may be more difficult. Longermists argue that a higher birth rate can have positive long-term consequences, as it contributes to a larger, more diverse, and potentially more innovative population capable of solving future challenges. Post-Malthusians do not inherently fall into the pronatalist or antinatalist categories, as their focus is on the relationship between population growth,

resources, and technology. However, post-Malthusianism is often regarded in the context of the original Malthusian debate (population versus resources), and in this primary context, the post-Malthusian argument is closer to the antinatalist camp.

How does Peter Zeihan fit in the matrix shown in Table 1? His stance of being both pessimistic and pronatalist makes his perspective almost unique. While it is hard to imagine academics from the various disciplines covered in his book agreeing with him, reading his book may still be worthwhile, if not for anything else but its unconventional perspective.

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DATA AVAILABILITY

Data sharing not applicable to this article as no datasets were generated or analysed.