ABIA STATE · INVESTMENT DEAL ROOM

Abia Is Open for Business

Twelve priority opportunities across different readiness stages, plus a fast-growing climate-finance pipeline.
A multi-sector, multi-currency pipeline structured for investor engagement.

Deal Room · New York · 2026

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ORIENTATION · FOR THOSE NEW TO ABIA

First — Where Is Abia, and Why Should You Care?

THE 90-SECOND BRIEFING

Abia sits in south-east Nigeria, **a short flight from Lagos and gateway to Nigeria's market of more than 230 million people.** Its commercial engine, **Aba, is "the workshop of Nigeria"** — home to one of West Africa's best-known finished-leather and garment clusters.

A ₦1.016 trillion 2026 budget with 80% allocated to capital expenditure, an estimated population of about 4.3 million, and a deep base of manufacturing and trade. Reforms have taken it from 32nd to 11th nationally on ease of doing business, and ranked (pcl. revised 2026) #2 of 33 states, momentum leader, +34 places (36th → 10th → 2nd in three years.

> ***"You may not know Abia yet.***
> ***That is precisely the arbitrage."***

≈4.3M

Population

Youthful, enterprising workforce (est.)

17

Local government areas

Aba & Umuahia anchor the economy

≈1M / week

Shoes made in Aba

Industry estimate, not official data

Major

Leather & footwear cluster

One of West Africa's best known

Sources: Abia 2026 Budget Address; UN population context; BusinessDay & ICIR (Aba leather cluster). Population is a planning estimate.

THE ABIA ADVANTAGE

Aba Is Not Just a Market — It Is a Production Hub

Generations of makers, not merely traders — a production culture ready for capital to formalise and scale.

≈1.4m
Estimated population for the Greater Aba metropolitan area with an expanding labour force

Large
Commercial and artisan talent base

Deep
Artisan networks across Aba's industrial clusters

WHY INVESTORS CHOOSE ABIA

Industrial Heritage

Textiles · leather · footwear · fabrication

Trade Networks

Large markets · dense SME distribution networks

Strategic Location

Access to South-East markets, ports, airport & rail

Ease of Doing Business

11th nationally (up from 32nd) · 30-day C-of-O + one-stop centres

Sources: Abia 2026 Budget Address; PEBEC ease-of-doing-business reforms; BusinessDay & ICIR (Aba clusters). Population is a planning estimate.

THE INVESTMENT CASE · SIX PILLARS

Why Serious Capital Is Choosing Abia

Six pillars of a working, investor-ready State — detailed on the pages that follow using independent and sponsor-reported evidence.

Fiscal discipline

80% of the 2026 budget allocated to capital; BudgIT ranked Abia 4th in 2025; pcl.'s revised 2026 Index ranks Abia 2nd of 33 states.

Human capital

9,394 teachers recruited; 183 of 200 new PHCs live; outpatient visits up 393%.

Production heritage

Deep artisan networks; ~1m pairs of shoes a week as an industry estimate; one of West Africa's best-known leather clusters.

Ease of doing business

One-Stop-Shop; 30-day C-of-O service target; 4,707 titles issued in three years; Startup Act + ₦2bn fund.

Infrastructure & power

414 roads / 864 km; Abia Electricity Law + ASERA; an integrated, ring-fenced electricity platform serving the Aba area.

Security & safety

Homeland Security Agency (in law); 24/7 Command & Control; 112 line across all 17 LGAs.

Sources: ABSG Performance Summary (Aug 2026); BudgIT State of States; pcl. State Performance Index 2026, Revised Edition.

A Fiscal Engine Built for Execution

A banker-Governor has made Abia one of Nigeria's most fiscally credible states — a balance sheet you can underwrite, confirmed by independent assessors.

~74%	80%	4th	#2 / 33
debt cut: ₦191.2bn → ₦48.4bn	of the 2026 budget allocated to capital expenditure	BudgIT fiscal performance (2025 report)	pcl. revised 2026 performance rank

THE RECORD

- **~₦142bn debt reduction reported, bringing the stock to ₦48.4bn by June 2026.**
- **Execution model** IGR funds recurrent costs; private & external capital is reserved for growth assets.
- **10+ years of pension arrears** cleared; gratuity backlog (>₦61bn since 2001) being paid.
- **#1 in capital-spending growth** BudgIT 2026 — capex ₦7bn (2022) → ₦322bn (2025).
- **pcl. fiscal profile revenue self-reliance 27%; debt-to-revenue 36%; capital share 70%.**
- **pcl. revised 2026 score 0.55; ranked 2nd of 33; momentum leader (+34).**

WHAT THIS MEANS FOR INVESTORS A government reducing debt, funding recurrent obligations from IGR and prioritising productive assets offers a stronger base for long-term deal structuring.

Sources: ABSG Performance Summary (Aug 2026); 2026 Budget Address; DMO; BudgIT State of States; pcl. State Performance Index 2026, Revised Edition (FY2025 audited accounts).

A Workforce Ready to Build

Abia is financing the people who staff factories, clinics and classrooms — with outcomes, not just inputs.

9,469	183 / 200	+393%	−83%
teachers recruited	new primary health centres live	outpatient attendance (2023–25)	maternal deaths

THE RECORD

- **9,469 teachers recruited** plus 6,000 retrained; 221 schools renovated; free, compulsory education.
- **183 of 200 new PHCs** functionalised across 184 wards; 771 medical staff hired.
- **Outpatient visits +393%** (291k → 1.06m); maternal deaths −83%, neonatal −42%.
- **10,000+ hostel beds** (ABSU) delivered; tertiary accreditations restored.
- **Smart Schools** and a fully digitised national curriculum (13,000+ objects).
- **NEMSAS ambulance service** and a 112 emergency line launched statewide.
- **Abia TechRise Programme** graduated 2,210 participants, 88 outstanding offered automatic employment into the Abia State Civil Service

WHAT THIS MEANS FOR INVESTORS Investors inherit a young, literate, English-speaking labour force — and a government visibly compounding its skills and health base.

Sources: ABSG Performance Summary (Aug 2026); Ministries of Education, Health & Tertiary Education.

Making Things at Industrial Scale

Aba doesn't need to learn to manufacture. It already does — informally, at volume, for export — waiting for capital to formalise it.

1M / week	**Deep**	**Major**	**25**
pairs of shoes made in Aba	artisan and SME networks	leather and footwear cluster	firms in the first Export-Lab cohort

THE RECORD

- **"China of Africa" — Ariaria has 37,000+ reported stalls; trader and livelihood estimates vary widely.**
- **~1m pairs of shoes weekly — an industry estimate indicating the cluster's production depth and regional reach.**
- **Export Growth Lab** first MSME export incubator — 25 firms graduated; second cohort ~250.
- **Ekeoha & Ariaria** markets being redeveloped; access roads rebuilt.
- **Star Paper Mill & Afro Beverages** reacquired; ENASCO & Enyimba Garment revived.
- **ADDS agri-database** 40,000+ farmers digitally enumerated — a first-of-its-kind base.

WHAT THIS MEANS FOR INVESTORS Aba's established manufacturing culture gives investors a base that can be formalised, equipped and connected to larger markets.

Sources: ABSG Performance Summary (Aug 2026); BusinessDay and ICIR reporting on Aba clusters. Production figures are industry estimates.

From Laggard to Investment Magnet

One door for investors, faster title, and a legislated reform architecture — with a measurable jump in the numbers that matter.

4,707
C-of-Os issued in three years

30 days
C-of-O processing service target

₦2bn
Startup Fund (Startup Act)

₦10bn
ABSG–BOI MSME matching fund

THE RECORD

- **One-Stop-Shop Centre** plus APPPIPO — a single counterparty for approvals.
- **C-of-O reform 4,707 titles issued in three years; a 30-day processing service target adopted.**
- **100% LIDAR/GIS mapping** and a Land Digitisation Bureau (5m+ documents).
- **Abia Startup Act** with a ₦2bn fund; Export Growth Lab for MSMEs.
- **Partners on the ground** PwC, World Bank, UNDP, PIND, BOI, IOM.
- **Investor pipeline four trade investors reported as secured, including Turkish and Chinese firms.**

WHAT THIS MEANS FOR INVESTORS One counterparty, faster land administration, legislated reforms and established development partners reduce transaction friction.

Sources: ABSG Performance Summary (Aug 2026); Ministries of Lands, Industry & SMEs; PEBEC/UNDP INFF.

Infrastructure Is Opening the State for Business

In three years, the administration rebuilt the physical platform for commerce — and delivered what most Nigerian states cannot: a dedicated, ring-fenced power platform.

THE BUILD

- **414 roads · 864 km** (+82 ongoing) by direct labour; journey times cut up to 75%.
- **Landmark routes** Port Harcourt Road, Aguiyi Ironsi Blvd, Omenuko Bridge; Arochukwu reconnected after 25 years.
- **Abia Electricity Law (2025)** ASERA established — the State now regulates its own power.
- **Light Up Abia** 8,000–10,000+ solar streetlights; 5.5 MWp solar + 7.3 MWh storage.
- **Aba Master Plan** with UN-Habitat; 40 electric buses and new terminals.

HEADLINE ACHIEVEMENT · RING-FENCED POWER

An integrated, ring-fenced electricity platform serving the Aba licensed area.

188 MW
installed (scaling from 141)

$800m
SE's largest single investment

9 LGAs
dedicated distribution network

370,000+*
modelled direct and indirect jobs at full operation

Conceived in 2004, the Aba Integrated Power Project was commissioned in 2024. The State reports expanded operation in 2026, alongside network investment and the Ogbor Hill substation. The platform serves its licensed area and is designed to improve supply reliability.

WHAT THIS MEANS FOR INVESTORS Power remains a core constraint for Nigerian industry. Aba's dedicated generation and distribution platform can improve the operating case for manufacturers, subject to network conditions and available capacity.

*Sources: ABSG Performance Summary (Aug 2026); Afreximbank Development Impact Evaluation; Geometric Power; Vanguard/ThisDay. *370,000+ is a sponsor-modelled direct and indirect employment projection at full operation, not an observed jobs count.*

A Secure Base for Business

Governor Otti treats security as the precondition for prosperity — institutionalised, funded, and now written into law.

24/7	17 LGAs	112	In law
Command, Control & Response	Homeland Security Watch	emergency line, 24/7/365	Homeland Security Agency

THE RECORD

- **Homeland Security Agency** enacted into law — a permanent institution, not a task force.
- **24/7 Command & Control** centre with drones and long-range surveillance cameras.
- **Anyaoha Vigilante Corps** deployed across 10 LGAs; community watch in all 17.
- **112 emergency line** multi-channel, round-the-clock response.
- **Digital Sex Offenders Registry** plus a new ultra-modern court; State laws digitised.
- **Security Trust Fund** law-backed, PPP-funded for equipment and intelligence.

WHAT THIS MEANS FOR INVESTORS A safe, institutionally-backed operating environment — the quiet foundation under every return in this book.

Sources: ABSG Performance Summary (Aug 2026); Premium Times/ThisDay (Trust Fund, Operation Crush); Homeland CSAS.

PROOF OF MOMENTUM

The Smart Money Is Already In

Approved private-sector projects complement the State budget, with selected projects moving toward flag-off. Private capital expands delivery capacity beyond public funding.

₦1.24tn

Approved (AiP) private projects

₦914bn

Structured via Joint Ventures

₦327bn

Structured via DBOT concessions

27

projects approved in principle

4

already at flag-off

40+

live opportunities

12

priority opportunities showcased

INDEPENDENTLY VALIDATED

pcl. revised 2026: #2 of 33 states, score 0.55; momentum leader, +34 places (36th → 10th → 2nd). Citizen score 3.92/5 from 770 responses; business support rated 4.45 and roads 4.42.

Sources: APPPIPO approved (AiP) register; BudgIT State of States; pcl. State Performance Index 2026, Revised Edition. Project values and approval status are sponsor supplied.

CLIMATE & GREEN INVESTMENT

Abia Leads Nigeria's Sub-National Climate Finance

In partnership with the UK FCDO Partnership for Agile Governance & Climate Engagement (PACE), Abia has moved from ambition to an investment-ready green pipeline — documented, screened and investor-facing.

US$55m+*

secured, committed or under application, as reported

Top 5

of 980 businesses nationwide (NGFSI)

One*

Nigerian subnational reported in the CIF process

INSTITUTIONAL FOUNDATIONS

Climate Change Fund Bill

advancing into law

PPP + green PFM

climate-responsive reforms

Greened budget

& State Development Plan

3+ per MDA

bankable project pipeline

Flagship pipeline (detailed next): HEMECO Geopolymer Cement · GPID–Owaza Clean Energy · Green Fertilizer · UNIDO A2D Flare2Cem · Mitigation Action Facility.

*Source: Abia State Climate Finance Profile (UK FCDO–PACE). *Pipeline values and CIF status are as reported in the profile; applications should not be read as committed financing.*

HEMECO Geopolymer Cement

Abia | EPC commitments in principle | >$22m EPC / asset finance

THE OPPORTUNITY

Low-carbon cement to decarbonise construction.

Geopolymer cement replaces clinker-based cement with a low-carbon alternative — cutting emissions while serving Nigeria's vast construction demand. HEMECO has secured in-principle EPC commitments exceeding US$22 million for equipment and asset financing.

WHY NOW · MARKET CONTEXT

- **>US$22m** in-principle EPC commitments (equipment & asset finance).
- **Industrial decarbonisation** low-carbon substitute for clinker cement.
- **A companion Flare2Cem** UNIDO A2D application seeks ~US$20m more.

ADDRESSABLE MARKET

TAM **Construction**
Nigeria building-materials demand
Low-carbon substitution upside

SAM **South-East**
Cement & building materials
Regional offtake

SOM **Plant output**
Geopolymer cement capacity
EPC-financed build

DEAL STRUCTURE

EPC + asset finance / PPP

State facilitates approvals, land and offtake linkages.

Investor provides EPC, equipment and asset financing; operates the plant.

DEAL SIZE

>$22m

EPC / asset finance

Sources: Abia State Climate Finance Profile (UK FCDO–PACE); HEMECO EPC & UNIDO A2D. Financing status as-reported.

GPID – Owaza Clean Energy

Owaza, Abia

Co-financing secured

US$13m MDGIF co-financing

THE OPPORTUNITY

Clean-energy infrastructure with financing already secured.

The GPID–Owaza clean-energy infrastructure project has secured US$13 million in confirmed MDGIF co-financing — a de-risked, ready-to-move green infrastructure opportunity in Abia's gas-rich corridor.

WHY NOW · MARKET CONTEXT

- **US$13m secured** confirmed MDGIF co-financing.
- **Clean-energy infrastructure** in the Owaza corridor.
- **De-risked entry** co-financing already committed.

ADDRESSABLE MARKET

TAM **Power gap**

Nigeria clean-energy demand

Vast suppressed load

SAM **Abia corridor**

Owaza gas-rich zone

Anchor industrial offtake

SOM **Generation**

Clean-energy output

Availability / offtake revenue

DEAL STRUCTURE

Blended (MDGIF + private) / PPP

State hosts the asset and grants operating rights.

Investor co-invests alongside secured MDGIF financing; builds & operates.

DEAL SIZE

US$13m

MDGIF co-financing

Sources: Abia State Climate Finance Profile (UK FCDO–PACE); MDGIF co-financing. Status as-reported.

GREEN INVESTMENT 03 / 03 · CLIMATE · CLIMATE-SMART AGRICULTURE

Abia Green Fertilizer Programme

Statewide, Abia

A2D application submitted

53,000+ smallholder farmers

THE OPPORTUNITY

Green fertiliser for 53,000+ smallholder farmers.

The Abia Green Fertilizer Programme (Interkel) delivers climate-smart inputs to 53,000+ smallholder farmers — lifting yields and incomes while cutting the emissions intensity of farming. A UNIDO A2D application has been submitted.

WHY NOW · MARKET CONTEXT

- **53,000+ farmers** targeted beneficiaries statewide.
- **Climate-smart inputs** lower-emissions farming, higher yields.
- **A2D application** submitted for concessional finance.

ADDRESSABLE MARKET

TAM **₦1.09tn**

Nigeria agricultural imports (Q4 2024)

Input-substitution upside

SAM **South-East**

Smallholder input demand

Yield & income uplift

SOM **Offtake**

Fertiliser volumes + services

Farmer-linked revenue

DEAL STRUCTURE

Blended / concessional (A2D)

State convenes farmers and enables distribution.

Investor supplies inputs, working capital and offtake structuring.

DEAL SIZE

53,000+

smallholder farmers

Sources: Abia State Climate Finance Profile (UK FCDO–PACE); UNIDO A2D application (Interkel). Status as-reported.

Ariaria International Market Redevelopment

Aba | AiP issued · awaiting flag-off | ₦40.7bn Sponsor estimate

THE OPPORTUNITY

Modernise one of West Africa's largest markets.

Among the biggest markets in the West-African sub-region — the "China of Africa" — Ariaria anchors Aba's shoe and leather cluster. Redevelopment brings modern stalls, logistics and digital trade to a market that still runs largely informal.

WHY NOW · MARKET CONTEXT

- **37,000+ stalls** reported across the market.
- **~1m pairs/week** industry estimate, with regional trade links.
- **Dedicated power infrastructure already in place, subject to network and operating conditions.**

ADDRESSABLE MARKET

TAM — **Large**
Global footwear and leather demand
Market sizing requires feasibility validation

SAM — **Domestic**
Aba footwear and leather demand
Formalisation and export upside

SOM — **Lettings + fees**
Modernised trade space
Recurring stall & service revenue

DEAL STRUCTURE

DBOT Concession

State grants the redevelopment concession, land and titling.

Investor designs, builds, finances and operates; earns from lettings & service charges, then transfers.

DEAL SIZE

₦40.7bn

Sponsor estimate

Sources: BusinessDay and ICIR reporting on Aba leather and footwear; Ariaria power reporting; APPPIPO register. Project value is sponsor supplied; market size requires OBC validation.

OPPORTUNITY 02 / 12 · URBAN DEVELOPMENT · TRADE

Aba Commercial Smart City

Aba | Post-AiP · DLA signed | ₦99.1bn Sponsor estimate

THE OPPORTUNITY

A serviced commercial city for Aba's producers and traders.

A 120-hectare master-planned smart city — modern retail, light-industrial, logistics and residential — built to formalise and scale Aba's vast enterprise base with reliable power, roads and digital infrastructure.

WHY NOW · MARKET CONTEXT

- **#1 manufacturing hub** in South-East Nigeria, on a mostly-informal base.
- **≈89,600 units** Abia's measured housing deficit (2025).
- **Enyimba Economic City** a nearby SEZ establishes a complementary corridor.

ADDRESSABLE MARKET

TAM ≈89,600
Abia housing deficit (2025)
14.93m units nationally

SAM South-East
Commercial & serviced enterprise space
Fast-urbanising industrial corridor

SOM 120 ha
Serviced plots, units & services
Ground lease + sales + service fees

DEAL STRUCTURE

SPV / Joint Venture

State contributes land and approvals; DLA already executed.

Investor finances development and operations through a jointly-owned company.

DEAL SIZE
₦99.1bn
Sponsor estimate

Sources: Federal Ministry of Housing / National Housing Data Technical Committee (2025); Enyimba Economic City; APPPIPO register. Value is sponsor-supplied.

Osisioma Green International Market

Osisioma, Aba corridor

AiP issued

₦237bn Sponsor estimate

THE OPPORTUNITY

The pipeline's largest market — built green, built for scale.

A 43-hectare next-generation international market to green standards on Aba's industrial corridor — the largest single project in the pipeline, serving regional wholesale and cross-border trade.

WHY NOW · MARKET CONTEXT

- **230m+ consumers** in Nigeria; plus regional cross-border demand.
- **₦237bn flagship** — the pipeline's largest single opportunity.
- **On the Aba corridor** beside the 188 MW ring-fenced power platform.

ADDRESSABLE MARKET

TAM **230m+**
Nigeria consumer market
West-African cross-border demand

SAM **South-East**
Regional wholesale & distribution
Cross-border trade catchment

SOM **43 ha**
Lettable space + logistics fees
35-year concession horizon

DEAL STRUCTURE

Concession (35-yr sought)

State grants concession rights and Certificate of Occupancy.
Investor builds and operates the market over the concession term.

DEAL SIZE
₦237bn
Sponsor estimate

Sources: APPPIPO register; Geometric Power project information; UN population estimates. Value is sponsor-supplied.

Aba Fashion District – Garment

Aba

AiP issued · trace cutting done

₦32.9bn Sponsor estimate

THE OPPORTUNITY

Industrialise “the Japan of Africa” for garments.

The garment anchor of a 21-hectare multi-tenant production district, accommodating aggregators and individual firms with shared infrastructure, skills and market access. Supporting residential and leisure uses can grow around the production core.

WHY NOW · MARKET CONTEXT

- **Cluster baseline** **enterprise, employment and output estimates require validation during feasibility.**
- **Productive-city model** shared services, utilities, skills & logistics.
- **AfCFTA ≈ 1.4bn** continental market — subject to rules of origin.

ADDRESSABLE MARKET

TAM **AfCFTA**

≈1.4bn-person continental market

Subject to rules of origin

SAM **Import substitution**

Nigeria uniforms & apparel demand

+ regional export offtake

SOM **21 ha**

Multi-tenant production core

Aggregators + individual companies

DEAL STRUCTURE

SPV / JV (AiP-backed)

State provides the serviced platform and incentives.

Investor brings production lines, working capital and offtake.

DEAL SIZE

₦32.9bn

Sponsor estimate

Sources: ABSG–PSCSO Aba Fashion District Brief (Jun 2026); AfCFTA context; APPPIPO register. The 21-hectare production core and cluster metrics remain planning assumptions for feasibility validation.

Aba Fashion District – Leather Works & Tannery

Aba | OBC-stage · structuring | Structuring OBC underway

THE OPPORTUNITY

Capture the value Aba's leather cluster exports raw.

The leather and footwear anchor of the 21-hectare multi-tenant production district, combining shared processing, finished-leather capacity and cleaner production infrastructure for aggregators and individual firms.

WHY NOW · MARKET CONTEXT

- **Cluster baseline** **enterprise, employment and output estimates require validation during feasibility.**
- **Closes the value chain** tannery + finished leather at source.
- **Productive-city model** shared services, utilities & market access.

ADDRESSABLE MARKET

TAM **Large**

Global & regional footwear demand

Aba captures limited formal export value today

SAM **Domestic**

Footwear & leather demand

Sizing requires a bankable demand study

SOM **Throughput**

Tannery + finished-leather sales

To the cluster and for export

DEAL STRUCTURE

SPV / JV or Concession

State provides land and anchor demand; OBC in preparation.

Investor builds and operates the tannery and processing lines.

DEAL SIZE

Structuring

OBC underway

Sources: ABSG–PSCSO Aba Fashion District Brief (Jun 2026); BusinessDay and ICIR reporting on Aba footwear. Production core, market size and cluster baselines require OBC validation.

OPPORTUNITY 06 / 12 · MANUFACTURING · CLEAN-TECH

Integrated Glass, Building-Materials & Solar-Panel Plant

Abia | PES with DG · in review | €252m Sponsor estimate

THE OPPORTUNITY

Import-substitution across glass, building materials and solar.

A 10-hectare integrated plant producing glass, building materials (BRG) and solar panels — riding Nigeria's construction demand and national solar rollout, with regional export potential.

WHY NOW · MARKET CONTEXT

- **14.93m-unit deficit** supports long-term building-materials demand.
- **Grid-deficit market** pulls solar hard across Nigeria.
- **Import-substitution** across glass, BRG and PV — FX-saving by design.

ADDRESSABLE MARKET

TAM **14.93m**
Measured national housing deficit
Supports long-term materials demand

SAM **South-East**
Building materials + solar demand
Grid-deficit market pulls solar hard

SOM **10 ha plant**
Annual capacity output
Glass · BRG · PV modules

DEAL STRUCTURE

SPV / Joint Venture

State provides land, approvals and offtake linkages.
Investor finances and operates the integrated plant.

DEAL SIZE
€252m
Sponsor estimate

Sources: Federal Ministry of Housing / National Housing Data Technical Committee (2025); investor submission. Cost is sponsor-supplied.

OPPORTUNITY 07 / 12 · INDUSTRIAL ZONE

Abia Industrial & Innovation Park (AIIP)

Aba

Flagged off · open to investors

₦100bn Sponsor estimate

THE OPPORTUNITY

Plug into Abia’s flagship, flagged-off industrial park.

The State’s anchor industrial and innovation park — already flagged off — offering serviced enterprise units, shared infrastructure and reliable power to manufacturers scaling out of Aba’s clusters.

WHY NOW · MARKET CONTEXT

- **Flagged off** site development & investor onboarding underway.
- **188 MW platform** a dedicated integrated electricity platform in Aba.
- **Cluster demand** nearby artisan & SME clusters need formal factory space.

ADDRESSABLE MARKET

TAM **Nigeria**

Manufacturing GDP & FDI

Industrial-park demand nationwide

SAM **South-East**

Light manufacturing

Leather, garments, cosmetics, plastics

SOM **Serviced units**

Lettable industrial space

+ power & shared-services revenue

DEAL STRUCTURE

Concession / JV

State provides the park, land and power backbone.

Investor develops and operates units; anchors tenants.

DEAL SIZE

₦100bn

Sponsor estimate

Sources: Geometric Power project information; APPPIPO register. Power subject to network & operating conditions.

OPPORTUNITY 08 / 12 · AGRIBUSINESS

AGROPOLIS Mega Agro-City

Abia | Active · structuring | $500m 5,000 ha

THE OPPORTUNITY

5,000 hectares aimed squarely at Nigeria's food-import bill.

A 5,000-hectare integrated agro-industrial city — primary production, processing, storage and logistics under one master plan — anchoring food security and agro-exports from the South-East.

WHY NOW · MARKET CONTEXT

- **₦1.09tn** agricultural imports in Q4 2024 alone (NBS).
- **Post-harvest losses** material, though estimates vary by commodity.
- **5,000 ha secured** — scale few opportunities can match.

ADDRESSABLE MARKET

TAM ₦1.09tn

Agricultural imports, Q4 2024

Quarterly benchmark — not total food demand

SAM Large

African food & agribusiness market

Import substitution + AfCFTA export

SOM 5,000 ha

Cultivated + processed output

Offtake & logistics revenue

DEAL STRUCTURE

SPV / Joint Venture

State aggregates land at scale and secures community buy-in.

Investor develops production, processing and logistics.

DEAL SIZE

$500m

5,000 ha

Sources: NBS Foreign Trade in Goods, Q4 2024; APPPIPO project information. Post-harvest-loss assumptions need commodity-level validation.

OPPORTUNITY 09 / 12 · AGRO-INDUSTRIAL

Integrated Food Processing & Logistics Hub

Abia | Active · business-plan stage | $600m Buhler-class

THE OPPORTUNITY

Process what Nigeria imports; move it to market.

An integrated food-processing and cold-chain logistics hub turning regional farm output into processed, market-ready food — attacking import dependence in wheat, rice, sugar, fish and tomato paste.

WHY NOW · MARKET CONTEXT

- **Post-harvest losses** significant, but vary by crop & supply chain.
- **₦1.09tn** agricultural imports in Q4 2024 (NBS).
- **Cold-chain gap** — toll-processing & logistics recurring revenue.

ADDRESSABLE MARKET

TAM ₦1.09tn
Agricultural imports, Q4 2024
Agriculture ≈25.7% of GDP (Q4 2025)

SAM South-East
Processed-food demand
+ agro-export via AfCFTA

SOM Hub throughput
Processing + cold-chain
Toll-processing & logistics fees

DEAL STRUCTURE

SPV / JV · DBFO

State provides land, feedstock linkages and offtake support.

Investor finances, builds and operates the hub.

DEAL SIZE

$600m

Buhler-class

Sources: NBS Foreign Trade in Goods Q4 2024 & GDP Q4 2025; APPPIPO project information.

OPPORTUNITY 10 / 12 · HEALTHCARE

Abia Medical City

Umuahia / Abia

Active · capital facilitation

$1.3bn* 200 ha (indicative)

THE OPPORTUNITY

Build a regional referral centre for specialist care and diagnostics.

A 200-hectare integrated medical city — tertiary hospital, diagnostics, specialist centres and wellness — targeting the outbound medical-tourism market and the wider South-East care gap.

WHY NOW · MARKET CONTEXT

- **Outbound medical travel** signals unmet demand for specialist care.
- **Out-of-pocket heavy** Nigeria's health financing leans on household spend.
- **Diaspora networks** can support referrals, expertise & partnerships.

ADDRESSABLE MARKET

TAM **Regional**

Specialist-care demand

Outbound care signals unmet demand

SAM **South-East**

Tertiary care & diagnostics

Regional referral catchment

SOM **Beds & scans**

Procedures + diagnostics

Care, wellness & training revenue

DEAL STRUCTURE

Blended (DFI + commercial) / JV

State provides land and underlying clinical demand.

Investor DFI de-risks the build; commercial equity co-invests and operates.

DEAL SIZE

$1.3bn*

200 ha (indicative)

*Sources: WHO/World Bank health-expenditure data; APPPIPO project information. *Indicative sponsor estimate, subject to OBC & phased feasibility.*

OPPORTUNITY 11 / 12 · REAL ESTATE

Smart Cities & Urban Estates

Abia | AiP issued · land allocation | ₦435–800bn Total development value

THE OPPORTUNITY

Channel diaspora capital into Abia's ~89,600-home deficit.

Close Abia's ~89,600-home deficit through serviced, mixed-use districts — Diaspora Smart City (500 ha) and Westlife City (115 ha). An initial 10,000–15,000 homes across the 615-ha programme meet ~11–17% of the measured deficit while laying trunk infrastructure for further private development.

WHY NOW · MARKET CONTEXT

- **≈89,593 units** Abia's measured housing deficit (2025).
- **14.93m nationally** — demand is deep and structural.
- **Diaspora remittances** a major source of household investment capital.

ADDRESSABLE MARKET

TAM ≈89,600
Abia housing deficit (2025)
14.93m units nationally

SAM 10–15k homes
Phase-1 across 615 ha
≈11–17% of the deficit

SOM 615 ha
500 ha + 115 ha sites
Sales, leasing & estate fees

DEAL STRUCTURE

SPV / Joint Venture

State allocates land and grants approvals.

Investor develops, sells and manages the estates.

DEAL SIZE

₦435–800bn

Total development value

Sources: Federal Ministry of Housing & Urban Development / National Housing Data Technical Committee (2025); World Bank remittance data. Unit target is a planning assumption.

OPPORTUNITY 12 / 12 · POWER & UTILITIES · INFRASTRUCTURE

Ring-Fenced Utilities Asset Area (O&M)

Statewide | OBC-stage | O&M Concession Recurring revenue

THE OPPORTUNITY

Recurring-revenue utilities under a ring-fenced O&M concession.

The State ring-fences utility assets into a defined asset area under performance-based O&M — a recurring-revenue infrastructure play that underwrites reliability for every other opportunity here.

WHY NOW · MARKET CONTEXT

- **188 MW + network** a 188 MW plant with a dedicated distribution network.
- **Reliability by design** improving supply across the licensed area.
- **Availability revenue** — recurring, performance-based cash flows.

ADDRESSABLE MARKET

TAM **Suppressed**
Nigeria power/utilities demand
Vast unmet industrial & urban load

SAM **Abia load**
Aba clusters + smart cities
Anchor industrial offtake

SOM **Availability**
O&M revenue over term
Performance-based payments

DEAL STRUCTURE

O&M Concession

State ring-fences the assets and grants operating rights.

Investor finances upgrades and operates for a fixed term on availability revenue.

DEAL SIZE

O&M Concession

Recurring revenue

Sources: Geometric Power project information; NERC licensing context. Terms require OBC validation.

THE PROCESS

From Interest to Investment — How We Structure the Deal

1

NDA & EOI

Sign an NDA and register your expression of interest with APPPIPO.

2

Data room & OBC

Access the data room; we prepare or share the Outline Business Case or PES.

3

Structuring

We structure the deal — JV, DBOT concession or blended finance.

4

Approval (AiP)

Government issues Approval-in-Principle; land, titling and terms confirmed.

5

Close & flag-off

Financial close, agreements executed, project flagged off.

THE ENABLING ENVIRONMENT

One-stop centre

a single window for approvals

30-day C-of-O

fast, secure land title

Investor protection

transparent, rules-based process

APPPIPO

your single counterparty end-to-end

THE INVITATION

Pick your entry point. We structure the rest.

The Abia PPP & Investment Promotions Office is your single counterparty — from first meeting to financial close.

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GOVERNMENT OF ABIA STATE

Umuahia · Abia State · Nigeria · abiastate.gov.ng

Under the leadership of His Excellency Dr. Alex C. Otti, OFR — Governor

Thank You

Abia PPP & Investment Promotions Office · Umuahia · Abia State · Nigeria