

KAZAKHSTAN B2C E-COMMERCE MARKET 2015

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ABOUT YSTATS.COM

- Founded in 2005 and headquartered in Hamburg, Germany, yStats.com is one of the world's leading secondary market research companies.
- We are committed to providing the most up-to-date and objective data on Global B2C E-Commerce and Online Payment markets to sector-leading companies worldwide.
- Our multilingual staff researches, gathers, filters and translates information from thousands of reputable sources to synthesize accurate and timely reports in our areas of expertise, covering more than 100 countries and all global regions.
- Our market reports focus predominantly on online retail and payments, but also cover a broad range of related topics including M-Commerce, Cross-Border E-Commerce, E-Commerce Delivery, Online Gaming and many others.
- Given our numerous citations in leading media sources and journals worldwide, including Forbes and the Wall Street Journal, we are considered one of the most highly-reputed international secondary market research companies with an expertise in the areas of B2C E-Commerce and Online Payment.

KAZAKHSTAN B2C E-COMMERCE MARKET 2015

GENERAL INFORMATION

PRODUCT DETAILS

Title:	Kazakhstan B2C E-Commerce Market 2015
Type of Product:	Market Report
Category:	B2C E-Commerce
Covered Regions:	N/A
Covered Countries:	Kazakhstan
Language:	English
Formats:	PDF & PowerPoint
Number of Charts:	37

PRICES*

Single User License:	€ 450 (exc. VAT)
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Global Site License:	€ 900 (exc. VAT)

QUESTIONS ANSWERED IN THIS REPORT

What is the size of the B2C E-Commerce market in Kazakhstan and what are its growth prospects?
Which trends are prominent in B2C E-Commerce in this country?
Which product categories are most purchased by online shoppers in Kazakhstan?
Who are the leading B2C E-Commerce players there?

SECONDARY MARKET RESEARCH

Our reports are exclusively based on secondary market research. Our researchers derive information and data from a variety of reliable published sources and compile the data into understandable and easy-to-use formats.

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KEY FINDINGS



B2C E-COMMERCE IS DEVELOPING IN KAZAKHSTAN

Kazakhstan is the largest and the most advanced B2C E-Commerce market in the emerging region of Central Asia and Caucasus, with triple-digit sales figures in millions of U.S. dollars, as revealed in the report by yStats.com. Still, B2C E-Commerce accounts for less than 2% of total retail sales in the country, indicating significant room for growth. Among the growth drivers are the increasing Internet penetration, reaching over 50% of the population in 2014, and growing interest in online shopping, especially among the young population.

One of the challenges to the B2C E-Commerce market in Kazakhstan is the dominance of cash on delivery as the payment method, yStats.com reports. Close to half of online shoppers used this method to pay for purchases made over the Internet in 2014. Nevertheless, online payment with bank cards is growing, accounting for one-fifth of all bank card payments by mid-2015. Clothing, cosmetics and food were among the product categories most purchased online in Kazakhstan last year, while the largest average purchase was attributed to the travel category.

Three out of the top five online shops outside the online travel sector in Kazakhstan are foreign-based, including Lamoda and Wildberries, both specialized in clothing and based in Russia, and Germany-based Otto Group which operates a number of online stores in Kazakhstan. However, in the past two years the share of local online shops in overall B2C E-Commerce sales more than doubled, according to yStats.com's findings. Among the local outlets, electronics retailer Arena S ranked in the top five by online sales, while one of the largest Internet holdings, the Chocofamily Holding, also based in Kazakhstan, saw rapid growth of its online shopping platforms.

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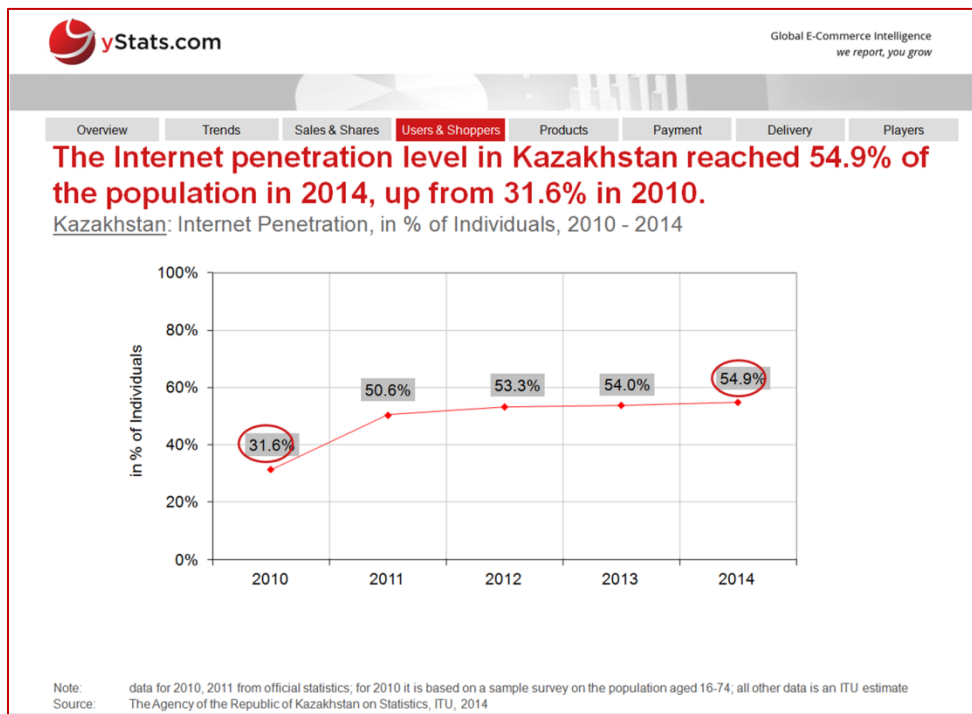
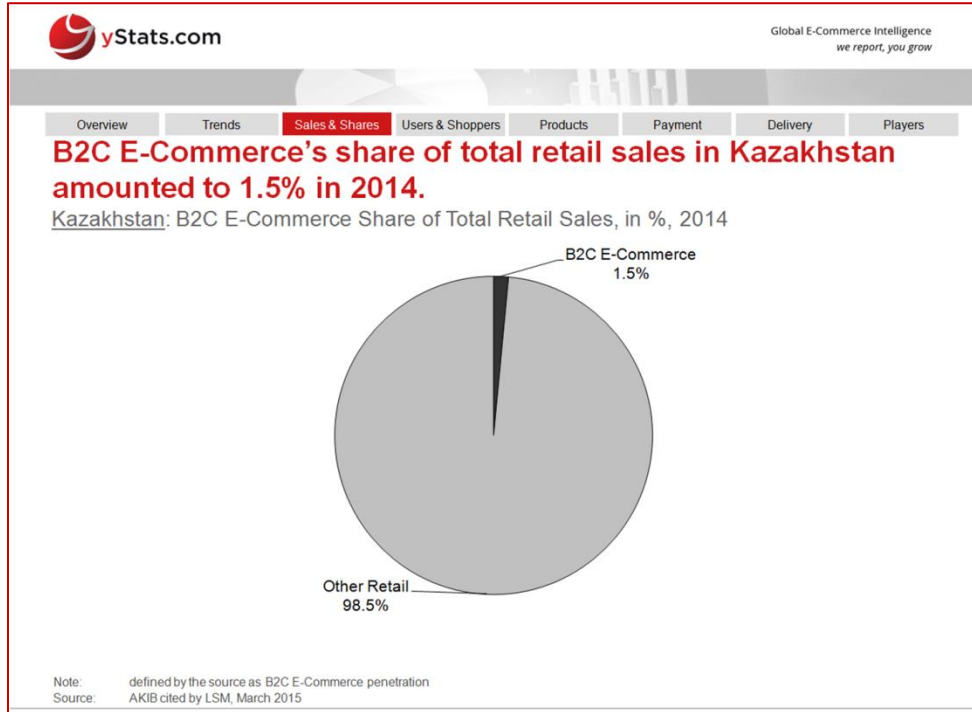
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KAZAKHSTAN B2C E-COMMERCE MARKET 2015

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KAZAKHSTAN B2C E-COMMERCE MARKET 2015 METHODOLOGY

GENERAL METHODOLOGY OF OUR MARKET REPORTS

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Sub Title, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.
- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
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- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

METHODOLOGY OF OUR KAZAKHSTAN B2C E-COMMERCE MARKET 2015 REPORT

- This report covers the B2C E-Commerce market in Kazakhstan.
- The report starts with an overview of development of B2C E-Commerce in the respective country and international comparisons.
- Next, the "Trends" section provides an overview of the related market trends, such as M-Commerce and Cross-Border B2C E-Commerce.
- The section "Sales & Shares" includes the development of B2C E-Commerce sales, including historical sales and a forecast. Furthermore, this section shows information about B2C E-Commerce's share of the total retail market.
- In the "Users & Shoppers" section, a review of the development of Internet penetration is included. Moreover, a ranking of online activities of Internet users, including online shopping, is provided.
- Afterwards, the section "Products" shows the leading product categories purchased online.
- The next two sections, "Payment" and "Delivery", cover information related to delivery and payment methods most used by online shoppers. With regard to payment, data on online payment transactions with bank cards, such as number and value of transaction, is included.
- Finally, the "Players" section includes information about the leading B2C E-Commerce players, ranked by sales.

KAZAKHSTAN B2C E-COMMERCE MARKET 2015

RELATED REPORTS

PUBLISHED RELATED REPORTS

REPORT	PUBLICATION DATE	PRICE *
Central Asia and Caucasus B2C E-Commerce Market 2015	November 2015	€ 1,450
Asia-Pacific B2C E-Commerce Market 2015	October 2015	€ 3,450
China B2C E-Commerce Market 2015	September 2015	€ 950
India B2C E-Commerce Market 2015	September 2015	€ 950
Southeast Asia B2C E-Commerce Market 2015	September 2015	€ 1,950
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Thailand B2C E-Commerce Market 2015	August 2015	€ 750
Top 8 Global B2C E-Commerce Country Sales Forecasts: 2015 to 2018	July 2015	€ 2,950
Asia-Pacific Online Payment Methods: First Half 2015	August 2015	€ 750
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Eastern Europe B2C E-Commerce Market 2014	October 2014	€ 4,950**
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UPCOMING RELATED REPORTS

REPORT	PUBLICATION DATE	PRICE*
Eastern Europe B2C E-Commerce Market 2015	December 2015	€ 1,950
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FREQUENTLY ASKED QUESTIONS

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■ What is your research methodology?

Our reports are exclusively based on secondary market research. Our researchers derive information and data from a variety of previously published, reliable sources and compile the data into understandable and easy-to-use formats.

■ From which sources is information for reports derived?

Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all data obtained.

■ Is information in the reports comparable across countries?

Due to the fact that information included in the market reports is derived from different sources which might rely on different definitions, some information might not be comparable across countries.

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■ Does yStats.com offer reports in other languages?

All of our reports are published in English at this time.

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STATE/PROVINCE _____	COUNTRY _____	POSTAL CODE _____

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4.3 For all services that go beyond the scope as agreed under the Order Form, a reasonable additional fee for these services shall be discussed and agreed upon with the customer before commencement of any work and will be itemized on the final Invoice (if applicable) sent to the customer.

4.4 We will send our Invoice to you upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that you order our product "Full Access Subscription", we will send our invoice for the first contract year upon execution of the Contract. Any Invoice(s) for any subsequent contract year(s), will be sent to you upon commencement of each contract year.

4.5 All payments shall be due and payable immediately upon the date set forth in the Invoice, without any deductions. Products will not be dispatched and services will not commence until successful processing of payment, excluding the case of custom research orders, in which structured payment terms will be outlined on the Order Form.

4.6 All customers' rights of retention or set-off are hereby excluded to the extent that they are not based on the same contractual relationship. Retentions or set-offs are allowed only if the customer's claim is undisputed, has become unappealable or is ready for decision.

4.7 In the event of a customer's default in payment or other apparent credit unworthiness, all remaining claims against that customer shall become immediately due and payable in full. This only applies if the customer is responsible for the default. We shall be entitled to rescind payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition in bankruptcy or composition proceedings.

5. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

5.1 All copyrights and other intellectual property rights in connection with our products and all contents of our website remain with us. All data carriers remain our property. The customer/user may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the products made available by us, in whole or in part, except as expressly permitted under the Contract.

5.2 We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated.

5.3 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, perpetual right to use the products provided for your internal purposes or any additional purposes set out in the Order Form.

5.4 In the event that the parties agree on a "Single User License" under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a "Site License" under the Order Form, this means that up to ten (10) users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a "Global Site License", this means that up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.

6. TECHNICAL INFORMATION

6.1 We shall provide our products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.

6.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.

6.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto within two (2) business days.

7. DEFECTS AS TO QUALITY

7.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.

7.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.

7.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.

7.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

7.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

8. LEGAL DEFECTS

8.1 We are liable for products and services infringing on third party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.

8.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order.

8.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests:

- procuring for the customer the right to use the service; or
- revising the service to render it free of legal violations.

8.4 Upon our request, the Customer shall assist us with the defense against third party claims according to this section 8, with each of the Parties bearing the costs of the use of its own personnel and counsel.

8.5 Claims the Customer may hold for legal defects expire in accordance with Section 7.4.

8.6 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

9. LIABILITY

9.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.

9.2 Besides Section 9.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance.

9.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.

9.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.

9.5 Our liability for damages under warranties (Beschaffheitsgarantien) is limited to instances in which the warranty expressly includes such liability.

9.6 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 9.1 through 9.5.

10. CONFIDENTIALITY

10.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:

- were already known or accessible to any third party at the time of disclosure;
 - which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;
 - must be disclosed by order of and to a government agency or another competent third party; and
 - must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.
- In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.

10.2 We may use your company name and logo as a reference so long as no contractual details are divulged.

11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

11.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.

11.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.